



User Guide – Admin/Centre Manager



Admin/Center Manager User Guide

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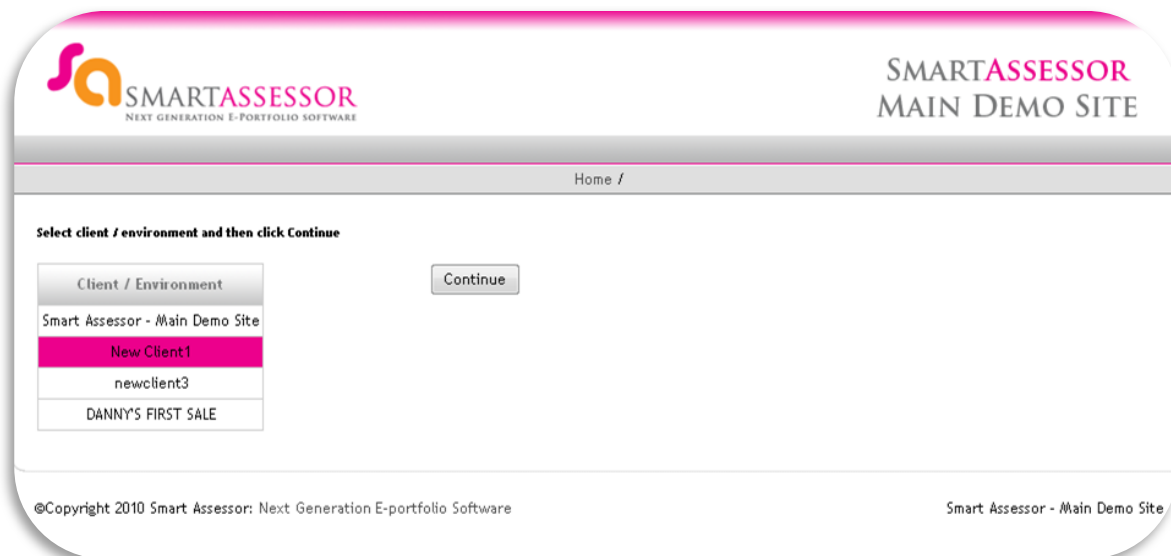
Logging In

Go to www.smartassessor.com, then click the client log in button at the top right.



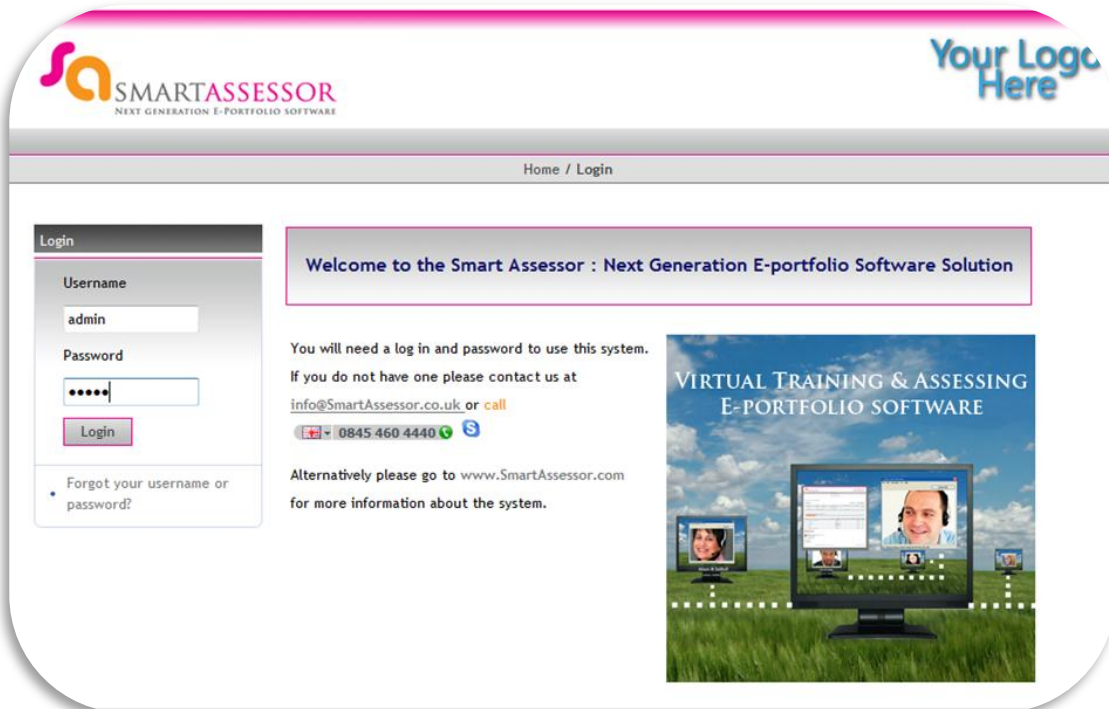
Client Log in button

Then click on your client name and press continue once your client is highlighted.



Client Login Screen

You will then need to enter your Admin username and password and press the login button.



The login screen features the SmartAssessor logo and a 'Your Logo Here' placeholder. A breadcrumb trail shows 'Home / Login'. On the left, a 'Login' form contains fields for 'Username' (with 'admin' entered) and 'Password' (with masked characters), a 'Login' button, and a link for 'Forgot your username or password?'. A central message box welcomes users and provides contact information: 'info@SmartAssessor.co.uk or call 0845 460 4440'. It also directs users to 'www.SmartAssessor.com'. On the right, a banner titled 'VIRTUAL TRAINING & ASSESSING E-PORTFOLIO SOFTWARE' shows a computer monitor displaying a video call.

User Login Screen

Adding Users

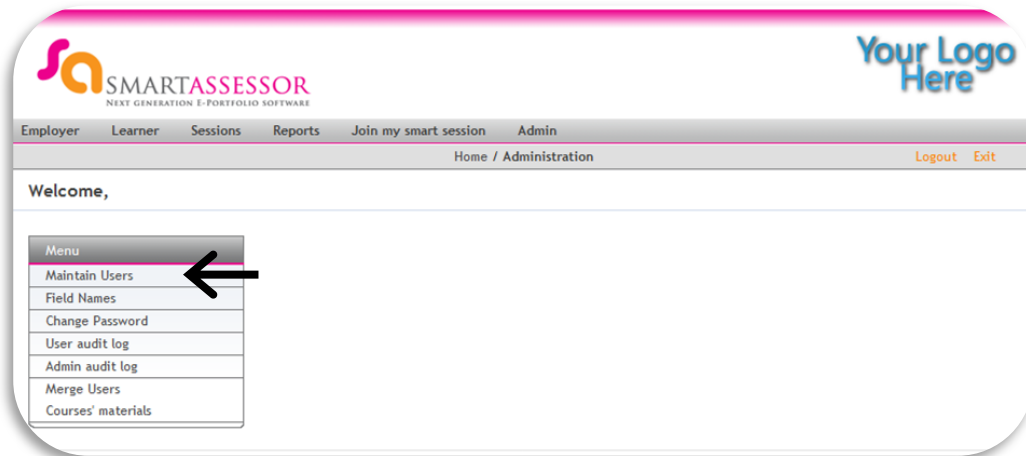
To add a new Assessor, IV, EV, Basic Administrator or a Master Administrator you will need to click on the admin button.



The main dashboard shows a navigation menu with 'Employer', 'Learner', 'Sessions', 'Reports', 'Join my smart session', and 'Admin'. The 'Admin' button is highlighted with a black arrow. Below the menu, a 'Welcome,' message is followed by a list of reports: 'Missing Data Reports', 'Missing Learner Data', 'Missing Company Data', 'Assessor Reports', 'Sessions Attended Report', 'Performance Monitoring', 'E/V Reports', 'External Verifier Report', 'Client Reports', 'Learner Export (Excel)', 'TNA', and 'Group TNA report'. A banner for 'VIRTUAL TRAINING & ASSESSING E-PORTFOLIO SOFTWARE' is on the right. The footer includes 'Copyright 2010 Smart Assessor: Next Generation E-portfolio Software' and a 'New' link.

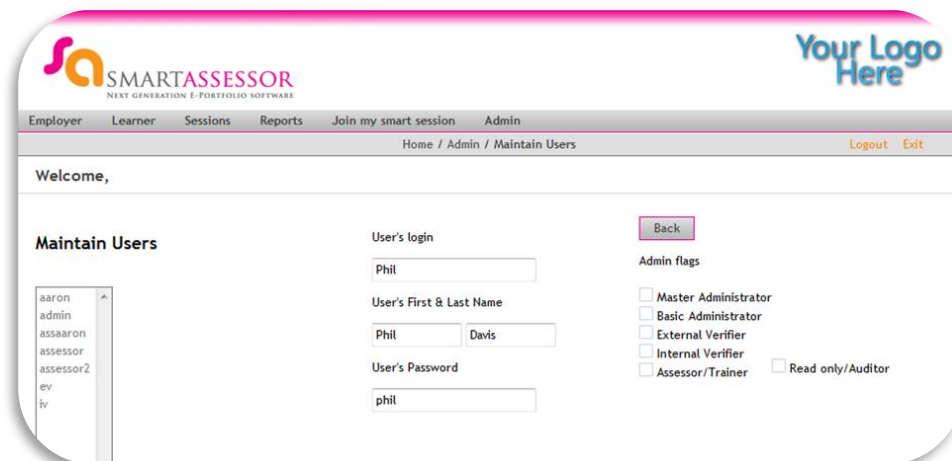
Admin Button

You will then need to click the maintain users button.



Maintain user's button

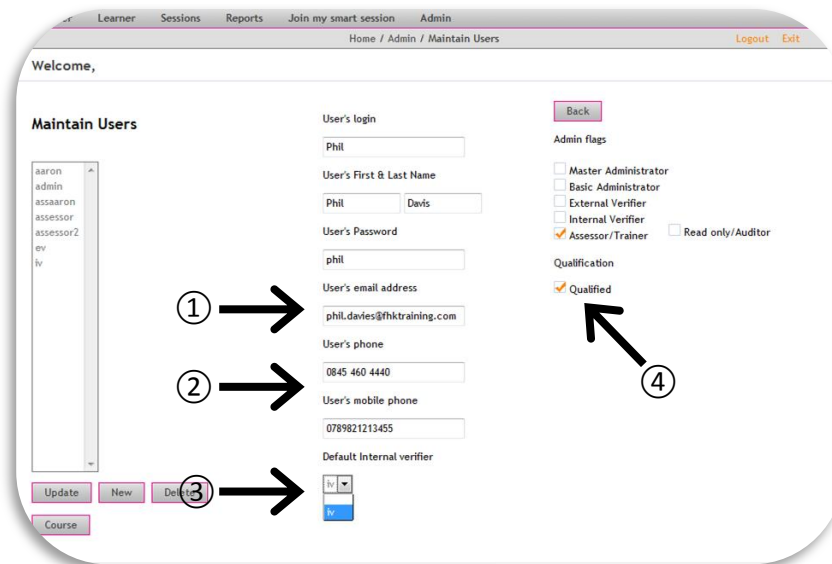
Then you need to enter the details of the new user you want to add and chose what type of user you want to create, Assessor, IV, EV, Basic Administrator or a Master Administrator (The difference being a basic admin can only add new learners/ employers and a master admin can add new learners/ employers as well as add new sessions, view reports, add new users and change passwords Etc.)



The screenshot shows the 'Maintain Users' form in the SMARTASSESSOR Admin interface. The breadcrumb trail is 'Home / Admin / Maintain Users'. The form includes a 'Back' button, a list of existing users (aaron, admin, assaaron, assessor, assessor2, ev, iv), and input fields for 'User's login' (Phil), 'User's First & Last Name' (Phil Davis), and 'User's Password' (phil). The 'Admin flags' section has checkboxes for Master Administrator, Basic Administrator, External Verifier, Internal Verifier, Assessor/Trainer, and a 'Read only/Auditor' checkbox.

Maintain user's screen

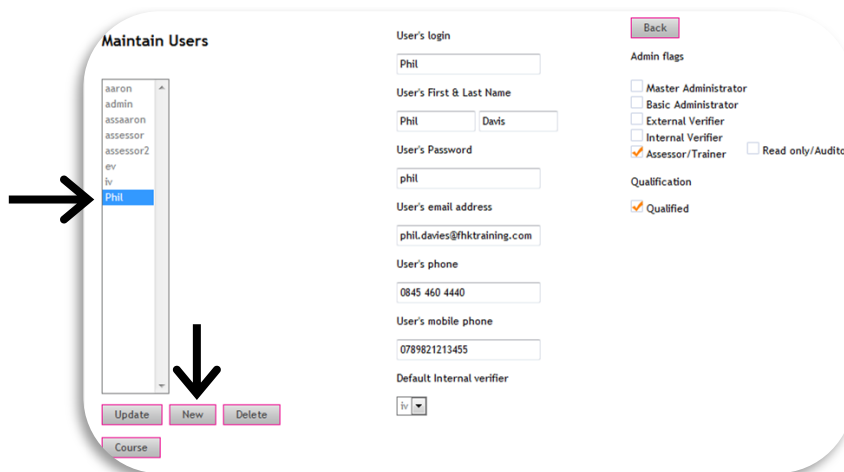
If you select an EV, IV or Assessor, you will be presented with the option to add additional information; such as: email^①, phone numbers^②, default IV^③, or whether they are qualified^④.



The screenshot shows the 'Maintain Users' interface. On the left is a list of users: aaron, admin, assaaron, assessor, assessor2, ev, iv. Below this list are buttons: Update, New, Delete, and Course. The main form contains fields for: User's login (Phil), User's First & Last Name (Phil, Davis), User's Password (phil), User's email address (phil.davies@fhktraining.com), User's phone (0845 460 4440), User's mobile phone (0789821213455), and Default Internal verifier (iv). On the right, there are 'Admin flags' (Master Administrator, Basic Administrator, External Verifier, Internal Verifier, Assessor/Trainer, Read only/Auditor) and a 'Qualification' section with a checked 'Qualified' checkbox. Numbered arrows point to: ① User's email address, ② User's phone, ③ Default Internal verifier, and ④ the 'Qualified' checkbox.

Maintain user's screen

Once you have entered the rest of the details, press the new button to save the new users, the user will then appear in the list of users down the right hand side of the page.

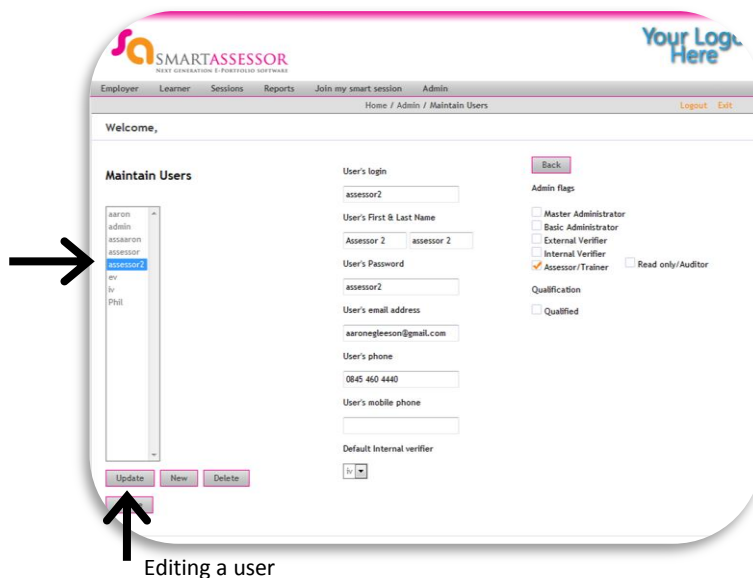


This screenshot shows the same 'Maintain Users' interface, but the user 'Phil' is now highlighted in the list on the left. An arrow points to the 'New' button, indicating the action to save the new user. The form fields and other elements remain the same as in the previous screenshot.

Adding new users

Update an Existing User

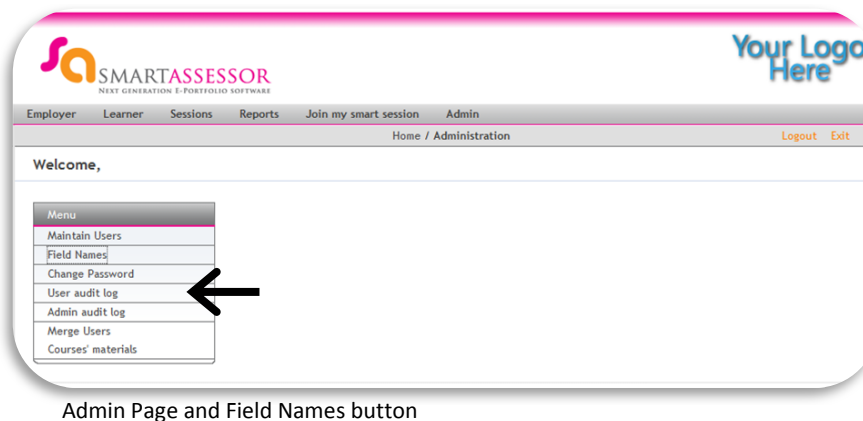
To update an existing user navigate to the maintain users pages (See page 4), from here click on the name of the user you want to edit.



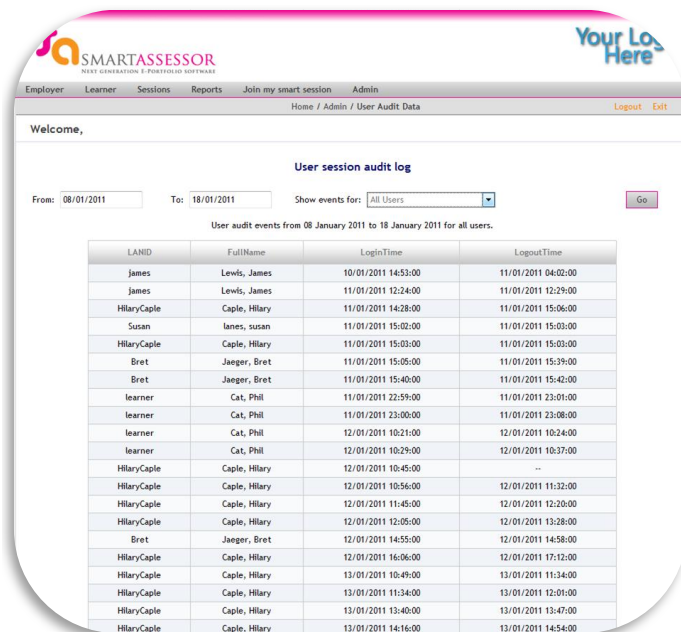
This will bring up their details; you can edit any of the information on this screen, once you have finished press the update button, this will save any new information you may have added.

User Audit Log

To view the user audit log navigate to the admin page and click on the user audit button.



This page will show you the times and dates Learners have logged in and out, you can filter these by date or by Learner.



SMARTASSESSOR
NEXT GENERATION E-PORTFOLIO SOFTWARE

Employer Learner Sessions Reports Join my smart session Admin

Home / Admin / User Audit Data Logout Exit

Welcome,

User session audit log

From: 08/01/2011 To: 18/01/2011 Show events for: All Users Go

User audit events from 08 January 2011 to 18 January 2011 for all users.

LANID	FullName	LoginTime	LogoutTime
James	Lewis, James	10/01/2011 14:53:00	11/01/2011 04:02:00
James	Lewis, James	11/01/2011 12:24:00	11/01/2011 12:29:00
HilaryCaple	Caple, Hilary	11/01/2011 14:28:00	11/01/2011 15:06:00
Susan	lanes, susan	11/01/2011 15:02:00	11/01/2011 15:03:00
HilaryCaple	Caple, Hilary	11/01/2011 15:03:00	11/01/2011 15:03:00
Bret	Jaeger, Bret	11/01/2011 15:05:00	11/01/2011 15:39:00
Bret	Jaeger, Bret	11/01/2011 15:40:00	11/01/2011 15:42:00
learner	Cat, Phil	11/01/2011 22:59:00	11/01/2011 23:01:00
learner	Cat, Phil	11/01/2011 23:00:00	11/01/2011 23:08:00
learner	Cat, Phil	12/01/2011 10:21:00	12/01/2011 10:24:00
learner	Cat, Phil	12/01/2011 10:29:00	12/01/2011 10:37:00
HilaryCaple	Caple, Hilary	12/01/2011 10:45:00	--
HilaryCaple	Caple, Hilary	12/01/2011 10:56:00	12/01/2011 11:32:00
HilaryCaple	Caple, Hilary	12/01/2011 11:45:00	12/01/2011 12:20:00
HilaryCaple	Caple, Hilary	12/01/2011 12:05:00	12/01/2011 13:28:00
Bret	Jaeger, Bret	12/01/2011 14:55:00	12/01/2011 14:58:00
HilaryCaple	Caple, Hilary	12/01/2011 16:06:00	12/01/2011 17:12:00
HilaryCaple	Caple, Hilary	13/01/2011 10:49:00	13/01/2011 11:34:00
HilaryCaple	Caple, Hilary	13/01/2011 11:34:00	13/01/2011 12:01:00
HilaryCaple	Caple, Hilary	13/01/2011 13:40:00	13/01/2011 13:47:00
HilaryCaple	Caple, Hilary	13/01/2011 14:16:00	13/01/2011 14:54:00

User session audit log

To filter by date, enter the date from and too in the boxes and press the go button.



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Employer Learner Sessions Reports Join my smart session Admin

Home / Admin / User Audit Data Logout Exit

Welcome,

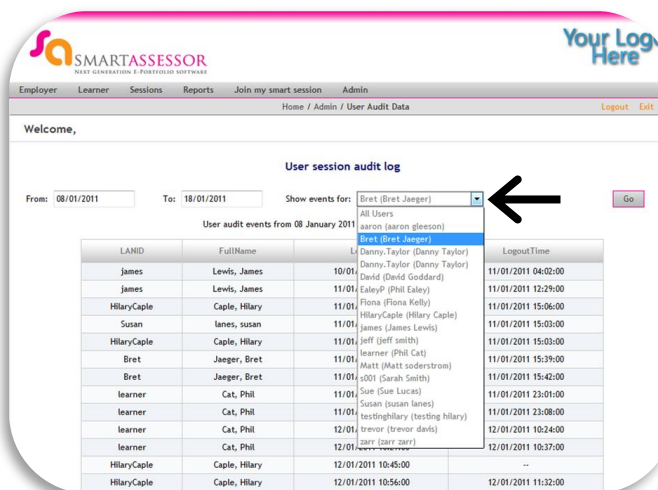
User session audit log

From: 08/01/2011 To: 18/01/2011 Show events for: All Users Go

User audit events from 08 January 2011 to 18 January 2011 for all users.

Date selection

To filter by Learner, select the learner you want from the drop down box and press the go button.



SMARTASSESSOR
NEXT GENERATION E-PORTFOLIO SOFTWARE

Employer Learner Sessions Reports Join my smart session Admin

Home / Admin / User Audit Data Logout Exit

Welcome,

User session audit log

From: 08/01/2011 To: 18/01/2011 Show events for: Bret (Bret Jaeger) Go

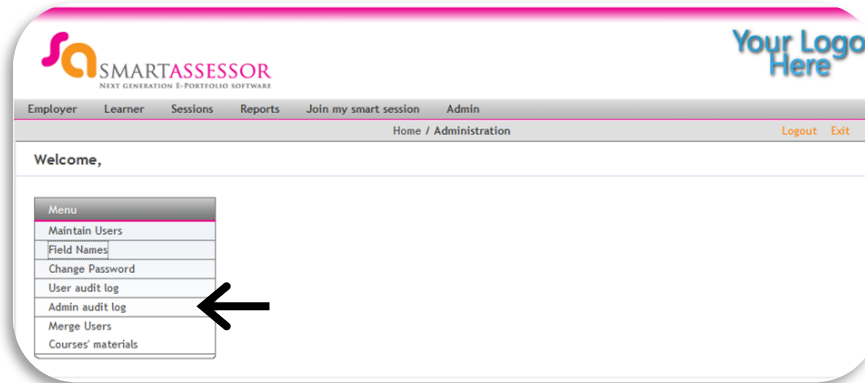
User audit events from 08 January 2011

LANID	FullName	LoginTime	LogoutTime
James	Lewis, James	10/01/2011 14:53:00	11/01/2011 04:02:00
James	Lewis, James	11/01/2011 12:24:00	11/01/2011 12:29:00
HilaryCaple	Caple, Hilary	11/01/2011 14:28:00	11/01/2011 15:06:00
Susan	lanes, susan	11/01/2011 15:02:00	11/01/2011 15:03:00
HilaryCaple	Caple, Hilary	11/01/2011 15:03:00	11/01/2011 15:03:00
Bret	Jaeger, Bret	11/01/2011 15:05:00	11/01/2011 15:39:00
Bret	Jaeger, Bret	11/01/2011 15:40:00	11/01/2011 15:42:00
learner	Cat, Phil	11/01/2011 22:59:00	11/01/2011 23:01:00
learner	Cat, Phil	11/01/2011 23:00:00	11/01/2011 23:08:00
learner	Cat, Phil	12/01/2011 10:21:00	12/01/2011 10:24:00
learner	Cat, Phil	12/01/2011 10:29:00	12/01/2011 10:37:00
HilaryCaple	Caple, Hilary	12/01/2011 10:45:00	--
HilaryCaple	Caple, Hilary	12/01/2011 10:56:00	12/01/2011 11:32:00

Filter by Learner

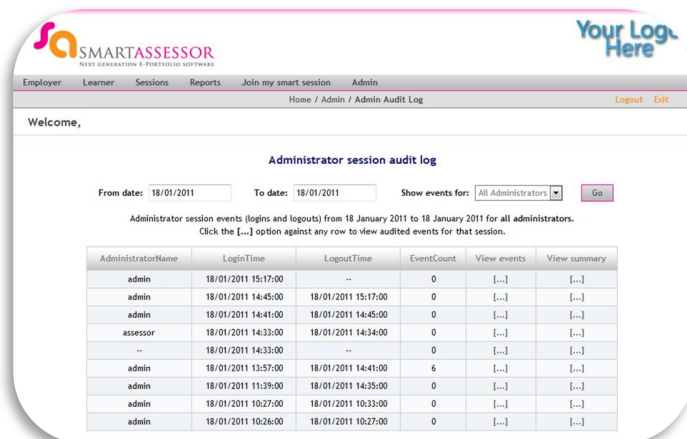
Admin audit Log

To View the Admin Audit Log navigate to the admin page and click on the admin audit button.



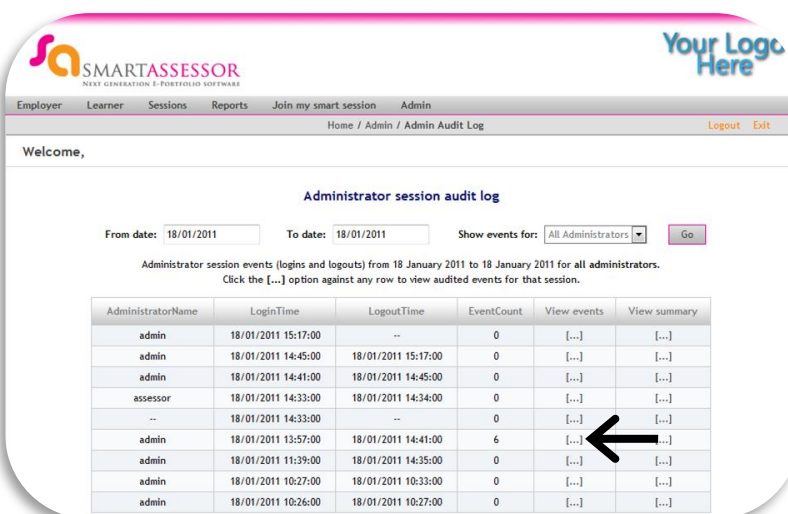
Admin audit log

This will show you log in times of Administrators and any events that have changed information in the system, E.G. Field names edited or deleted.



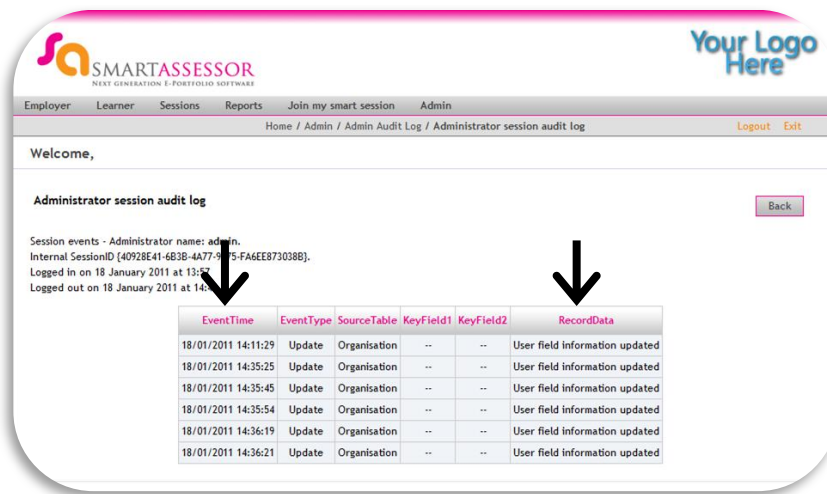
Administrator Log

To view events in more detail, click on the view events button.



View events button

This will open up a new page with the event details on, it will tell you what has changed and the time it changed



SMARTASSESSOR
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Employer Learner Sessions Reports Join my smart session Admin

Home / Admin / Admin Audit Log / Administrator session audit log Logout Exit

Welcome,

Administrator session audit log [Back](#)

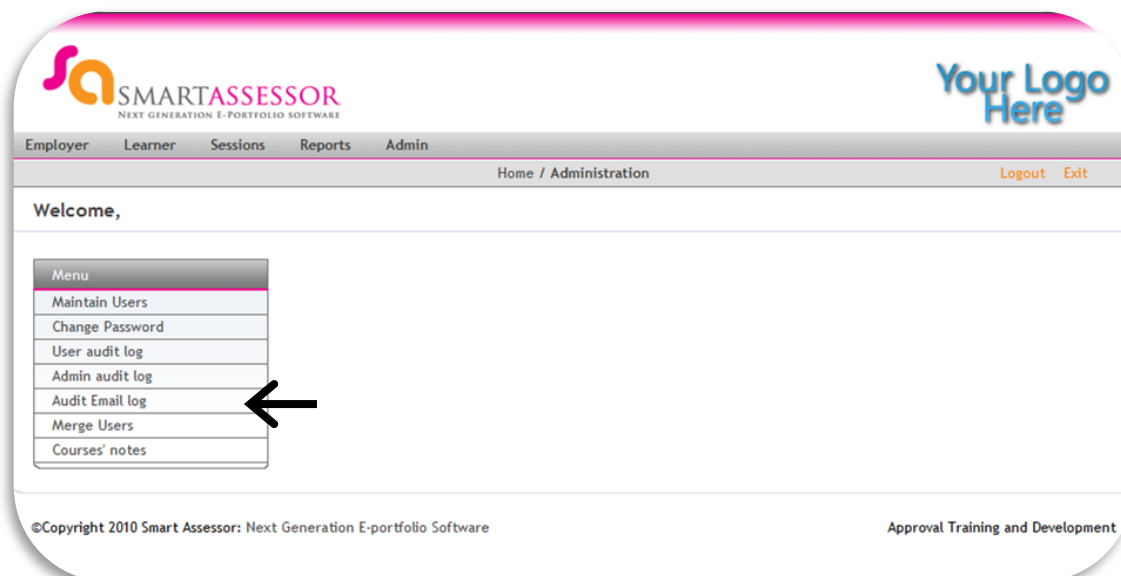
Session events - Administrator name: admin.
Internal SessionID {40928E41-6B3B-4A77-9075-FA6E873038B}.
Logged in on 18 January 2011 at 13:57
Logged out on 18 January 2011 at 14:36

EventTime	EventType	SourceTable	KeyField1	KeyField2	RecordData
18/01/2011 14:11:29	Update	Organisation	--	--	User field information updated
18/01/2011 14:35:25	Update	Organisation	--	--	User field information updated
18/01/2011 14:35:45	Update	Organisation	--	--	User field information updated
18/01/2011 14:35:54	Update	Organisation	--	--	User field information updated
18/01/2011 14:36:19	Update	Organisation	--	--	User field information updated
18/01/2011 14:36:21	Update	Organisation	--	--	User field information updated

Events page

Audit Email Log

To View the Audit Email Log navigate to the admin page and click on the audit Email button.



SMARTASSESSOR
NEXT GENERATION E-PORTFOLIO SOFTWARE

Employer Learner Sessions Reports Admin

Home / Administration Logout Exit

Welcome,

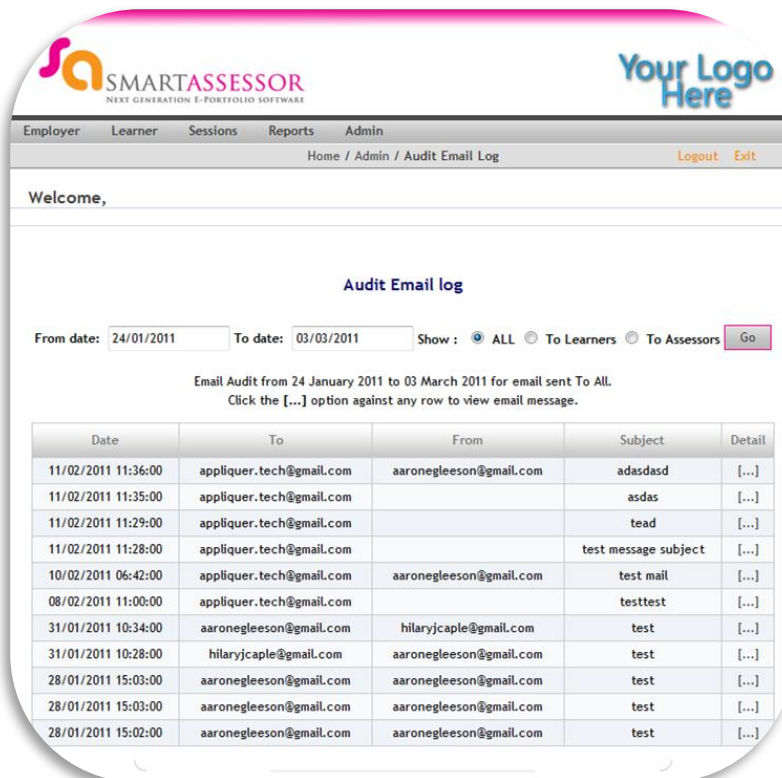
Menu

- Maintain Users
- Change Password
- User audit log
- Admin audit log
- Audit Email log
- Merge Users
- Courses' notes

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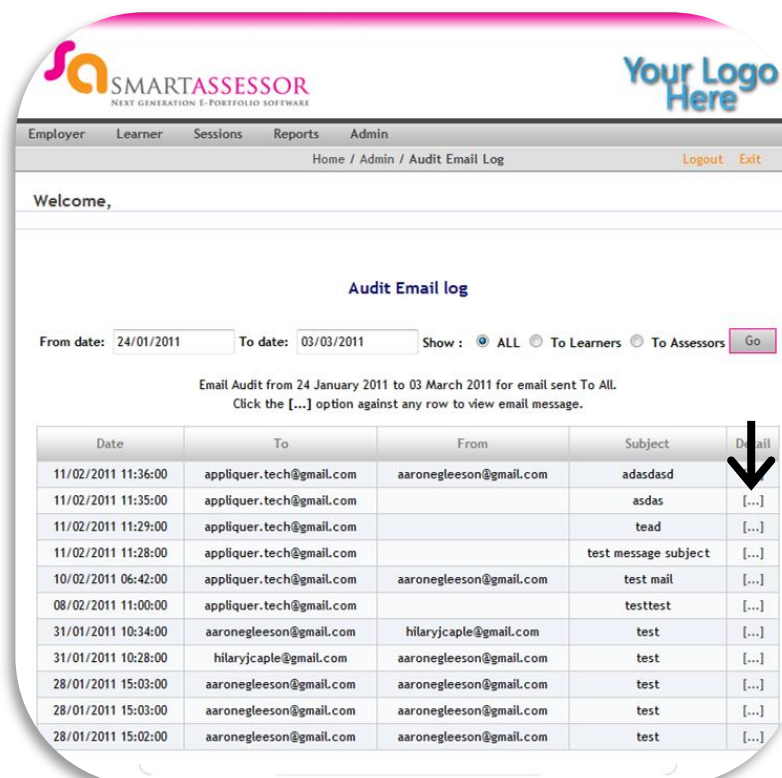
Audit email log button

This shows you all the email activity between assessors and learners.



Audit email log

You will be able to see the date of the email, the email addresses it was between and who it went too. To view the email message click the expand icon this will pop up a box with the message in.



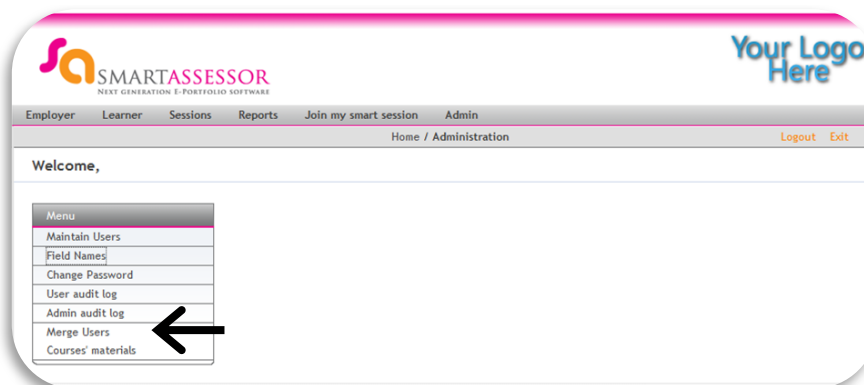
Email expand icon



Email message

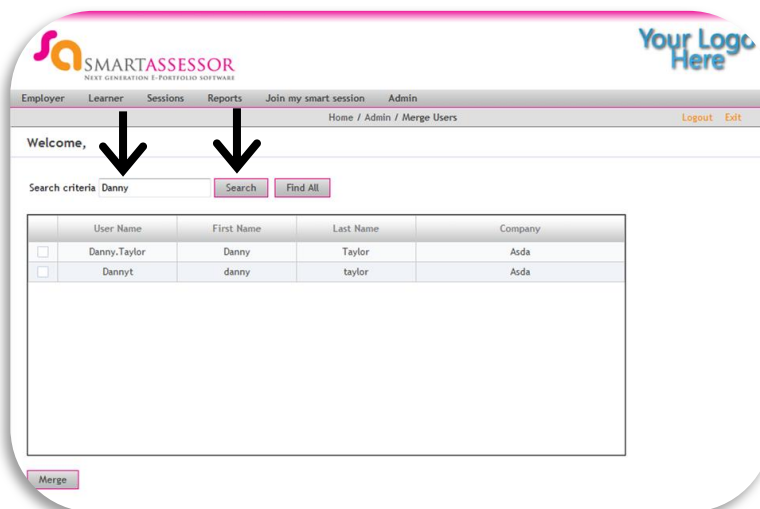
Merging Users

This is in case a Learner has been put into the system twice, to do this click the merge user button.



Merge user's button

This will open up the Merge user page, from here type in the name of the Learner you want to merge in the Search box and press the search button.



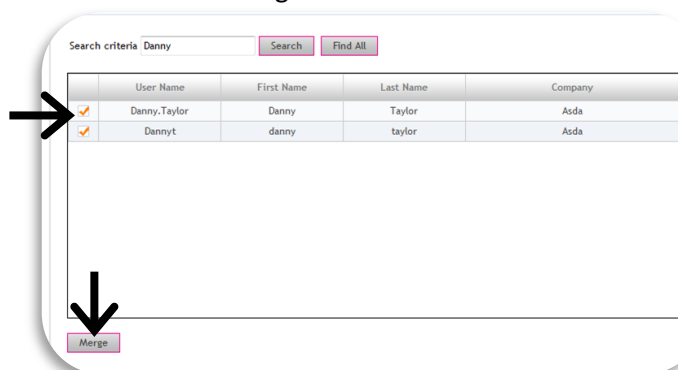
Search criteria: Danny

	User Name	First Name	Last Name	Company
<input type="checkbox"/>	Danny.Taylor	Danny	Taylor	Asda
<input type="checkbox"/>	Dannyt	danny	taylor	Asda

Merge

Search for learners

This will display all of the Users who match your criteria, to merge the Learners together, tick the box next to the Learners you want to merge and press the merge button. Please note this operation cannot be undone once merged.



Search criteria: Danny

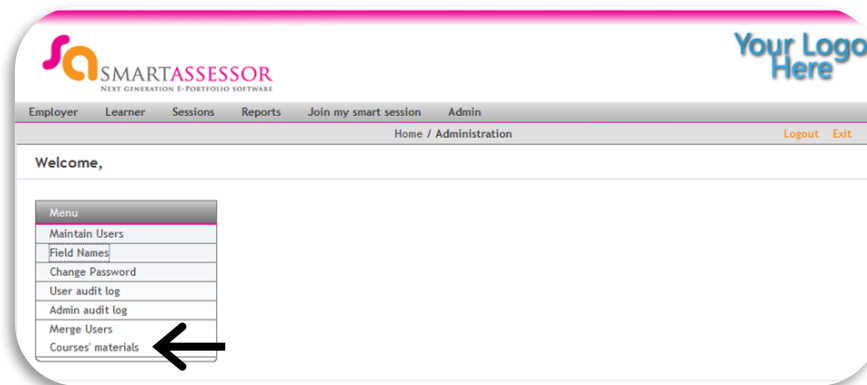
	User Name	First Name	Last Name	Company
<input checked="" type="checkbox"/>	Danny.Taylor	Danny	Taylor	Asda
<input checked="" type="checkbox"/>	Dannyt	danny	taylor	Asda

Merge

Merge learners

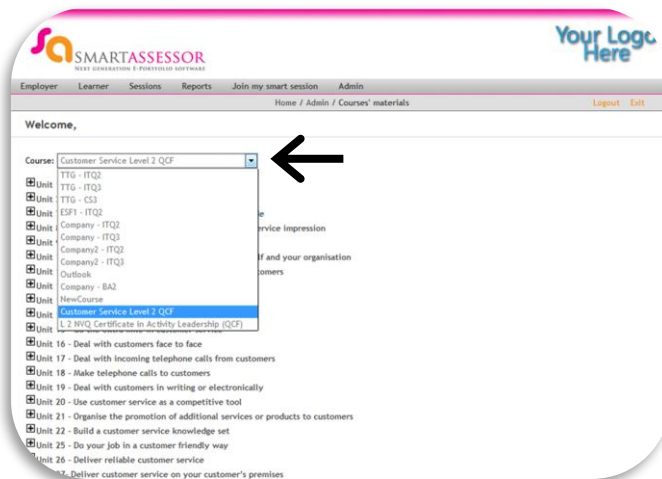
Uploading Course Materials

To upload course Materials click on the course materials button.



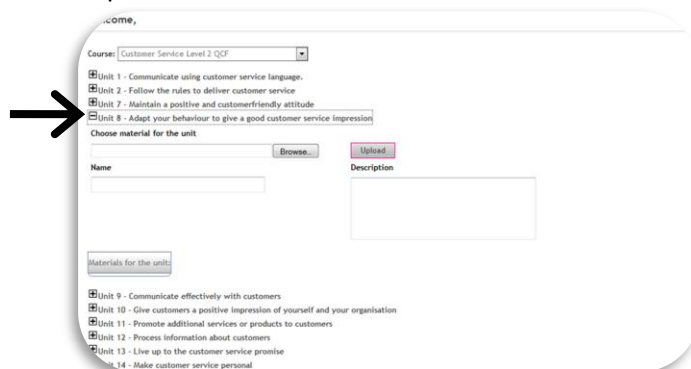
Course Materials

You then need to select the course you want to upload files to from the drop down box.



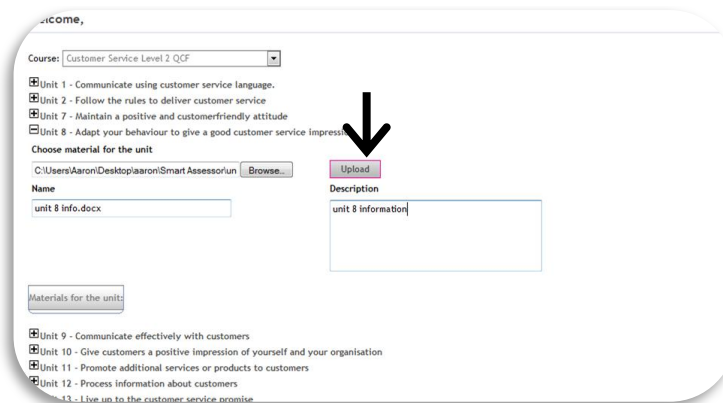
Course Materials

This will display the units for the chose course; you can either upload files to individual units or to the whole qualification. To upload to individual units click on the expand button next to the unit you want to upload too.



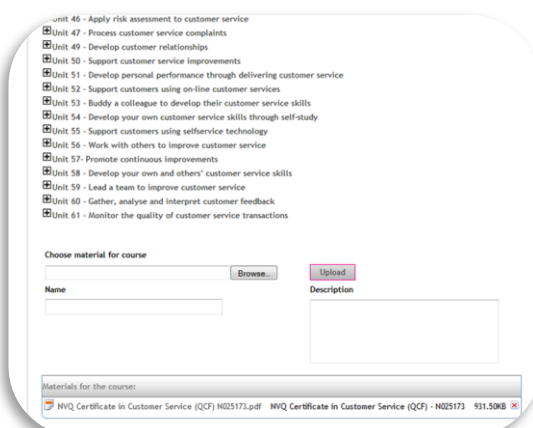
Expand button

This will present you with some options, you firstly need to press the browse button, to search for the file on your computer, once you have found the file, it will automatically name it for you; however you can change the name manually by editing it in the name box you may also want to enter description. Once you have filled in the information press the upload button to save the file in the system.



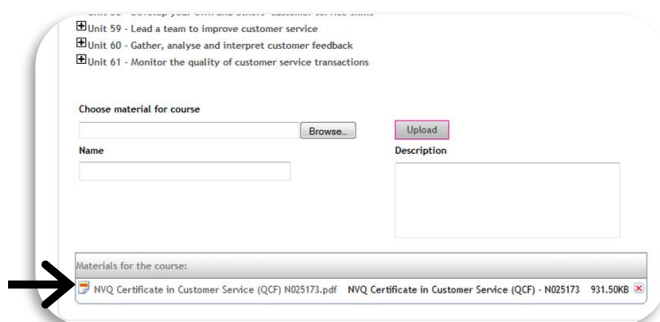
Uploading a file to a unit

To upload a file against the whole qualification, scroll down to the bottom of the page, where you will see the upload options. Repeat the same process as above to upload the file.



Uploading a file to a qualification

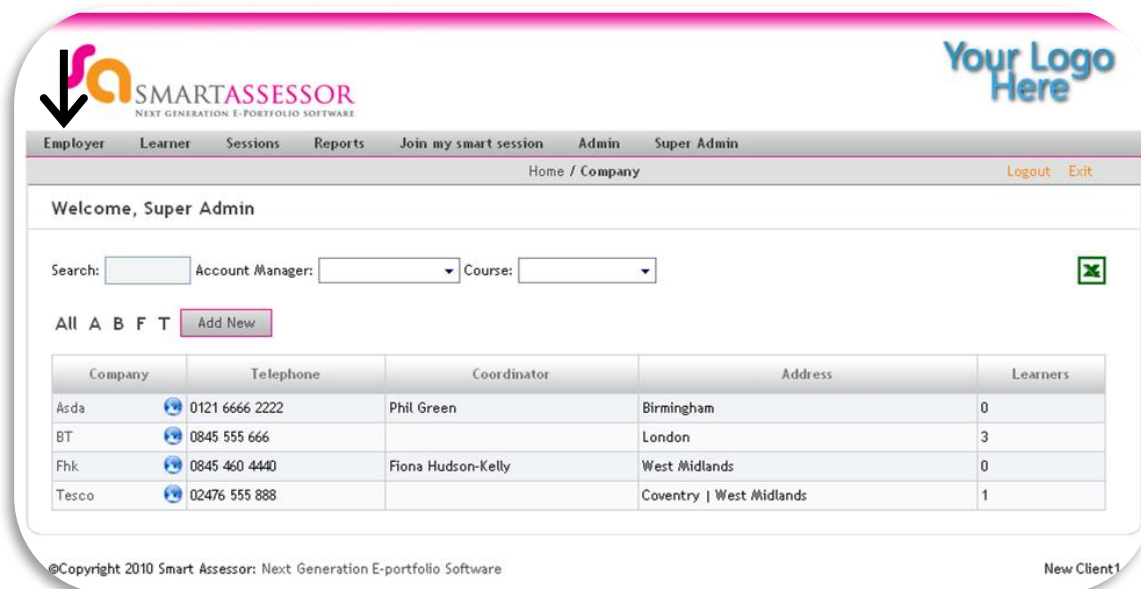
Once your evidence has been uploaded you will be able to see it and open it in the materials for the course box.



Uploaded evidence

The Employer Tab

You can search for and edit employer information by clicking on the employer tab.



SMARTASSESSOR
NEXT GENERATION E-PORTFOLIO SOFTWARE

Your Logo Here

Employer Learner Sessions Reports Join my smart session Admin Super Admin

Home / Company Logout Exit

Welcome, Super Admin

Search: Account Manager: Course:

All A B F T Add New

Company	Telephone	Coordinator	Address	Learners
Asda	0121 6666 2222	Phil Green	Birmingham	0
BT	0845 555 666		London	3
Fhk	0845 460 4440	Fiona Hudson-Kelly	West Midlands	0
Tesco	02476 555 888		Coventry West Midlands	1

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Employer screen

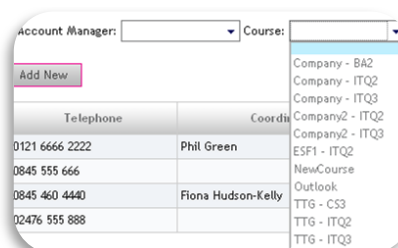
This will display all the companies in the database; from this screen you can filter by company initial letter by clicking on one of the letters:



All A B F T Add New

Initial search

Filter by Learner course from the drop down boxes:



Account Manager: Course:

Add New

Telephone Coordinator

0121 6666 2222 Phil Green

0845 555 666

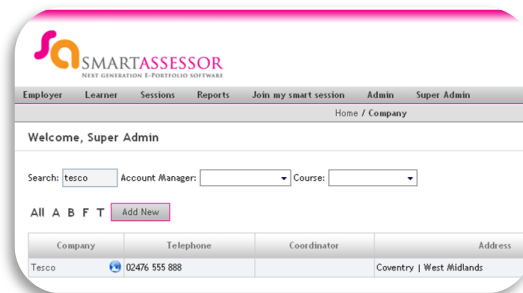
0845 460 4440 Fiona Hudson-Kelly

02476 555 888

Company - BA2
Company - ITQ2
Company - ITQ3
Company2 - ITQ2
Company2 - ITQ3
ESF1 - ITQ2
NewCourse
Outlook
TTG - CS3
TTG - ITQ2
TTG - ITQ3

Drop down filter

Or by manually typing in the name of the company you are looking for:



SMARTASSESSOR
NEXT GENERATION E-PORTFOLIO SOFTWARE

Employer Learner Sessions Reports Join my smart session Admin Super Admin

Home / Company

Welcome, Super Admin

Search: tesco Account Manager: Course:

All A B F T Add New

Company	Telephone	Coordinator	Address
Tesco	02476 555 888		Coventry West Midlands

Company search: Tesco

By clicking on the globe icon, you can jump straight to the company's website if they have one stored.

Company	Telephone	Coordinator	Address	Learners
Asda	0121 6666 2222	Phil Green	Birmingham	0
BT	0845 555 666		London	3
Fhk	0845 460 4440	Fiona Hudson-Kelly	West Midlands	0
Tesco	02476 555 888		Coventry West Midlands	1

Globe icon to go to company's website

Add new company

You can also add a new company from this screen by clicking on the add new button

Search: Account Manager: Course:

All A B F T **Add New**

Company	Telephone	Coordinator	
Asda	0121 6666 2222	Phil Green	Birn
BT	0845 555 666		Lo

This will open a new screen where you input the company information, once you have filled in the details, simply press the save button and the company will be added to the employer list.

SMARTASSESSOR Your Logo Here

Employer Learner Sessions Reports Join my smart session

Home / Company/ Logout Exit

Welcome, Assessor Assessor

A44 - Employer Identifier / EDRS Number

Address 1 Business Category

Address 2 # of Employees

Town/City Business Description

County

Postal Code

Telephone Comments

Website

Coordinator

eMail

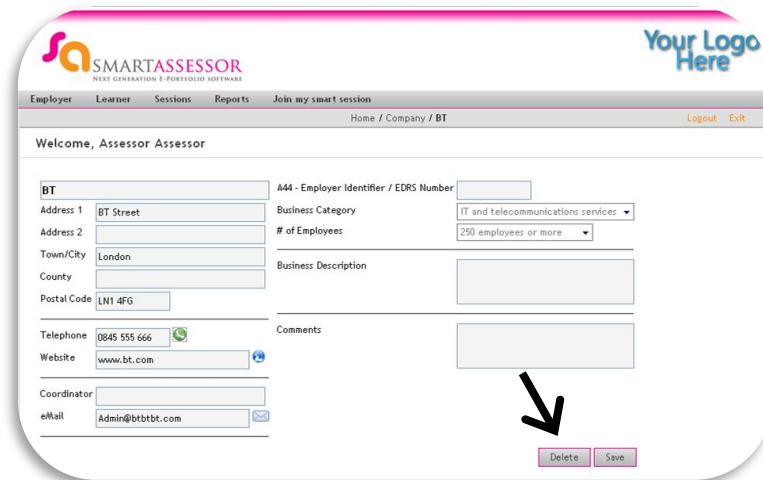
Company information screen

Once an employer has been created, you can then assign learners to them. You can also delete existing employers by clicking on the name of the employer

Company	Telephone	Coordinator	Address	Learners
Asda	0121 6666 2222	Phil Green	Birmingham	0
BT	0845 555 666		London	3
Fhk	0845 460 4440	Fiona Hudson-Kelly	West Midlands	0
Tesco	02476 555 888		Coventry West Midlands	1

Employer name

This will open the employer information screen, to delete the employer click the delete button



BT

Address 1 BT Street

Address 2

Town/City London

County

Postal Code LN1 4FG

Telephone 0845 555 666

Website www.bt.com

Coordinator

eMail Admin@btbtbt.com

M44 - Employer Identifier / EDRS Number

Business Category IT and telecommunications services

of Employees 250 employees or more

Business Description

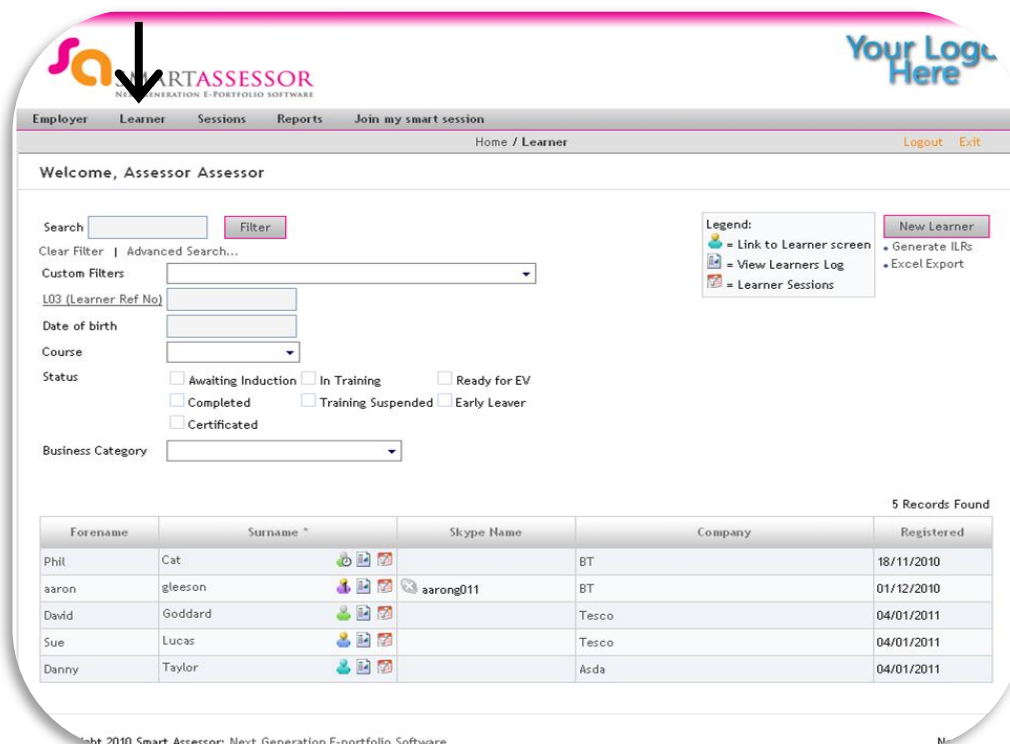
Comments

Delete Save

Deleting an employer

The Learner Tab

From here you can search for and edit learner information by clicking on the Learner Tab.



Search Filter

Clear Filter | Advanced Search...

Custom Filters

L03 (Learner Ref No)

Date of birth

Course

Status

☐ Awaiting Induction ☐ In Training ☐ Ready for EV

☐ Completed ☐ Training Suspended ☐ Early Leaver

☐ Certificated

Business Category

Legend:

- = Link to Learner screen
- = View Learners Log
- = Learner Sessions

New Learner

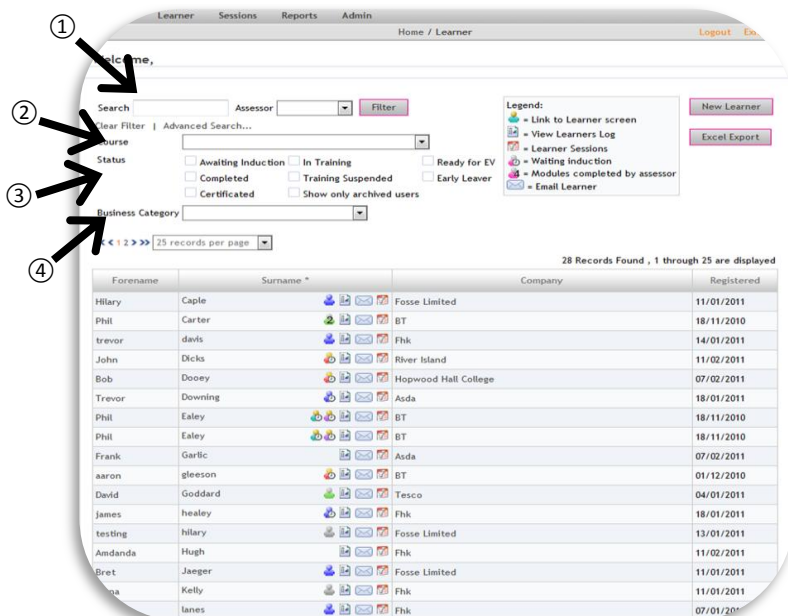
- Generate ILRs
- Excel Export

5 Records Found

Forename	Surname *	Skype Name	Company	Registered
Phil	Cat		BT	18/11/2010
aaron	gleeson	aarong011	BT	01/12/2010
David	Goddard		Tesco	04/01/2011
Sue	Lucas		Tesco	04/01/2011
Danny	Taylor		Asda	04/01/2011

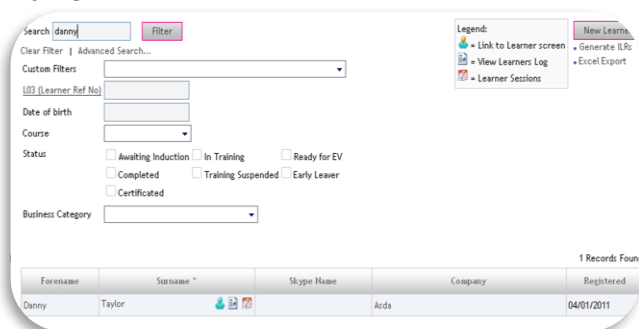
Learner button

This screen displays all of the Learners assigned to the assessor that is signed in, you can search and filter on a number of different criteria, by entering the name of the Learner you are looking for and pressing filter^①, by course^②, by status^③ or by business Category^④.

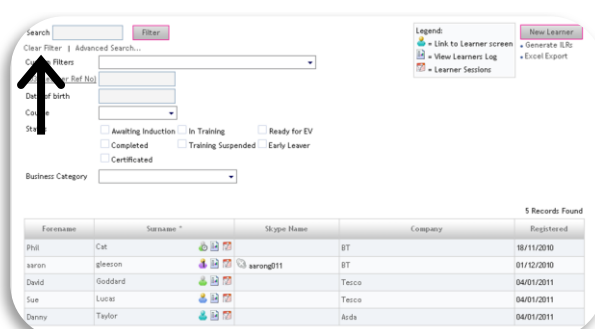


Learner screen

To Clear a Filter once you have simply click the clear filter button or make another search, this will automatically perform your most recent search for you without you having to clear the filter every time.

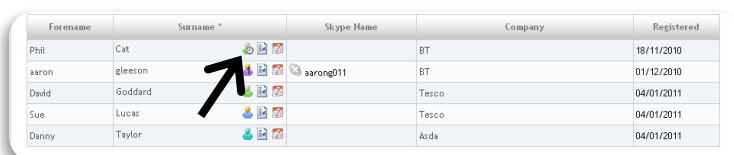


Filter on search for Danny



Clear filter button

You can also jump straight to a learners portfolio using the course icon.



Icon for Learners profile

View the Learners activity log; this is an overview of an Assessors activity per unit per learner showing the date the most recent session is for each unit (see below).

Forename	Surname *	Skype Name	Company	Registered
Phil	Cat		BT	18/11/2010
aaron	gleeson	aarong011	BT	01/12/2010
David	Goddard		Tesco	04/01/2011
Sue	Lucas		Tesco	04/01/2011
Danny	Taylor		Asda	04/01/2011

Icon for Learners activity Log

Activity Log

Select assessor: All Assessor

Select salesperson: All Sales

Select company: BT

Select unit: All Units

☐ Hide comments ☐ Include Archived

Company: BT Address: BT Street
 Tel: 0845 555 666
 Website: www.bt.com London
 Co-ord: Admin@btbt.com LNI 4FG

Learner	Unit chosen	Date attended	Completed	No comment
Lsc Own 2 - ITQ Level 3 (Assessor: assessor)				
aaron gleeson	2L - Website software			<input type="button" value="Add Comment"/>
Skype Name: aarong011	2H - E-mail - Outlook			
Co-ord: 0845 555 666	2D - IT Trouble shooting for users : Training Sessions	03/01/2011 04:30		
	2B - Operate a computer			
	3A - Make Selective Use of IT (mandatory) : Training Sessions	04/01/2011 11:00		
	3F - Artwork and Imaging Software : Observation	12/01/2011 10:30		
	3I - Word Processing Software : Question and Answer Session	05/01/2011 13:30		
	3N - Specialist or Bespoke Software			
316: Full NVQ Level 2 Training Programme (Assessor: assessor)				
Phil Cat	2A - Make selective use of IT (mandatory)	19/11/2010 12:00		<input type="button" value="Add Comment"/>
Skype Name:	2I - Word Processing : Training Sessions	24/11/2010 14:00		
Co-ord: 0845 555 666	2I - Word Processing : Training Sessions	08/12/2010 11:30		
	2I - Word Processing : Training Sessions	04/01/2011 10:00		
	2K - Databases : Question and Answer Session	03/01/2011 01:00		
	2K - Databases : Training Sessions	24/11/2010 12:00		

Learner's activity Log

You can also email the learner via the email icon, this will open a pop up to type your message in and email both the learner and the learners assessors so they can see you have contacted the learner.

Search Assessor

Clear Filter | Advanced Search...

<< < 1 2 > >> 25 records per page

Legend:


- = Link to Learner screen
- = View Learners Log
- = Learner Sessions
- = Waiting induction
- = Modules completed by assessor
- = Email Learner

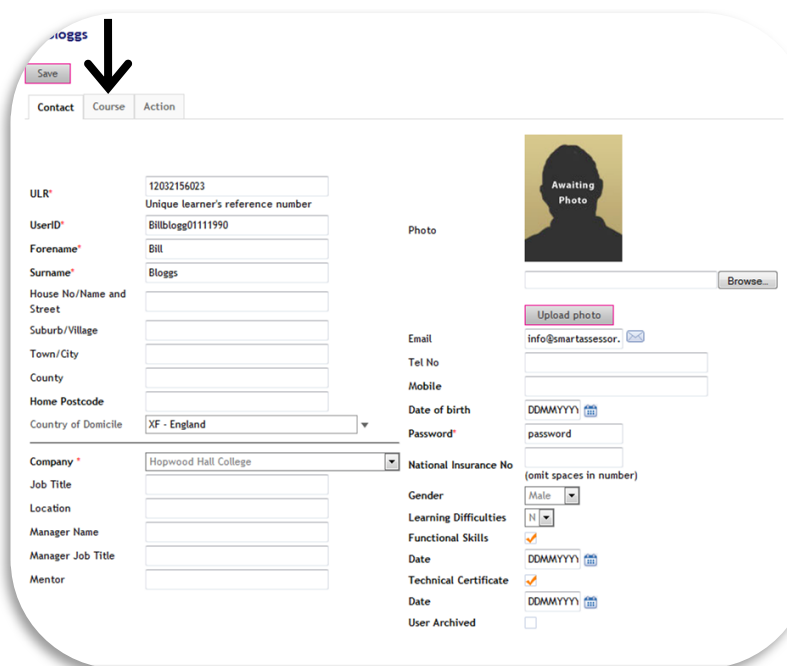
27 Records Found , 1 through 25 are displayed

Forename	Surname *	Company	Registered
Jayne	Boyd	Sanctuary Housing	24/02/2011
Hilary	Cable	Fosse Limited	11/01/2011
Phil	Cat	BT	18/11/2010
trevor	davis	Fhk	14/01/2011
Bob	Dooley	Sanctuary Housing	24/02/2011
Trevor	Downing	Asda	18/01/2011

Email Learner Icon

Adding a new Learner

You can also add a new learner using this screen via the New Learner button  this will open the add new learner screen, from here you can fill in the Learners details and press save, **please ensure you have atleast filled in the details marked with a red astrix which are, ULR, Username, Forename, Surname, Company and Password.** Once you have done this you will need to assign the Learner to a course, to do this click on the course tab.



The form includes the following fields:

- ULR***: 12032156023 (Unique learner's reference number)
- UserID***: Billblogg01111990
- Forename***: Bill
- Surname***: Bloggs
- House No/Name and Street**:
- Suburb/Village**:
- Town/City**:
- County**:
- Home Postcode**:
- Country of Domicile**: XF - England
- Company***: Hopwood Hall College
- Job Title**:
- Location**:
- Manager Name**:
- Manager Job Title**:
- Mentor**:
- Photo**: Awaiting Photo (with Upload photo button)
- Email**: info@smartassessor.com
- Tel No**:
- Mobile**:
- Date of birth**: DDMYYYY (with calendar icon)
- Password***: password
- National Insurance No**: (omit spaces in number)
- Gender**: Male
- Learning Difficulties**: N
- Functional Skills**:
- Date**: DDMYYYY (with calendar icon)
- Technical Certificate**:
- Date**: DDMYYYY (with calendar icon)
- User Archived**:

User details screen, course tab shown

This will open the course screen, to assign a new course for the Learner pick from the drop box the course you want and press the add button, this will assign the course you have chosen to the Learner



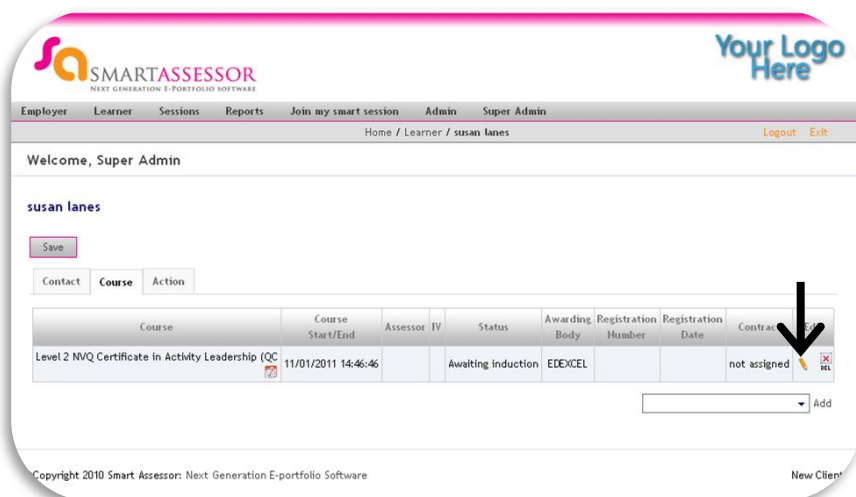
The screen displays the following information:

- Header**: SMARTASSESSOR, NEXT GENERATION E-PORTFOLIO SOFTWARE
- Navigation**: Employer, Learner, Sessions, Reports, Join my smart session, Admin, Super Admin
- Welcome**: Welcome, Super Admin
- User**: susan lanes
- Buttons**: Save, Contact, Course, Action
- Table**:

Course	Course Start/End	Assessor	IV	Status	Awarding Body	Registration Number	Registration Date	Contract
[Dropdown menu with 'Add' button]								
- Dropdown Menu Options**:
 - Company - BA2
 - Company - ITQ2
 - Company - ITQ3
 - Company2 - ITQ2
 - Company2 - ITQ3
 - Customer Service Level 2 QCF
 - ESF1 - ITQ2
 - Level2 NVQ Certificate in Activity Leadership (QC)** (highlighted)
 - NewCourse
 - Outlook
 - TTG - CS3
 - TTG - ITQ2
 - TTG - ITQ3

Assigning a course to a learner

You then have to assign the Learner to an assessor, by clicking on the pencil icon under the edit heading, this will allow you to edit the information shown.



SMARTASSESSOR
NEXT GENERATION E-PORTFOLIO SOFTWARE

Employer Learner Sessions Reports Join my smart session Admin Super Admin


Home / Learner / susan lanes Logout Exit

Welcome, Super Admin

susan lanes

Save

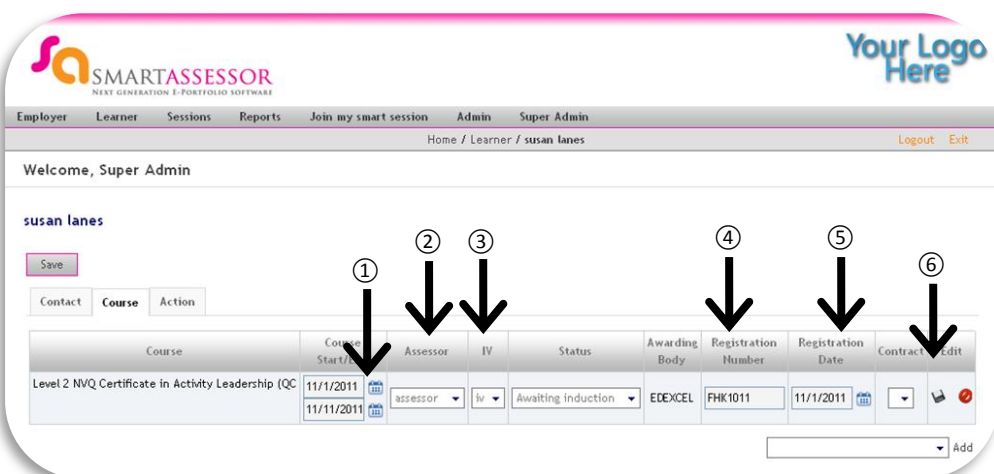
Contact Course Action

Course	Course Start/End	Assessor	IV	Status	Awarding Body	Registration Number	Registration Date	Contract	Edit
Level 2 NVQ Certificate in Activity Leadership (QC	11/01/2011 14:46:46			Awaiting induction	EDEXCEL			not assigned	

Add

Copyright 2010 Smart Assessor: Next Generation E-portfolio Software New Client

Edit icon



SMARTASSESSOR
NEXT GENERATION E-PORTFOLIO SOFTWARE

Employer Learner Sessions Reports Join my smart session Admin Super Admin










Home / Learner / susan lanes Logout Exit

Welcome, Super Admin

susan lanes

Save

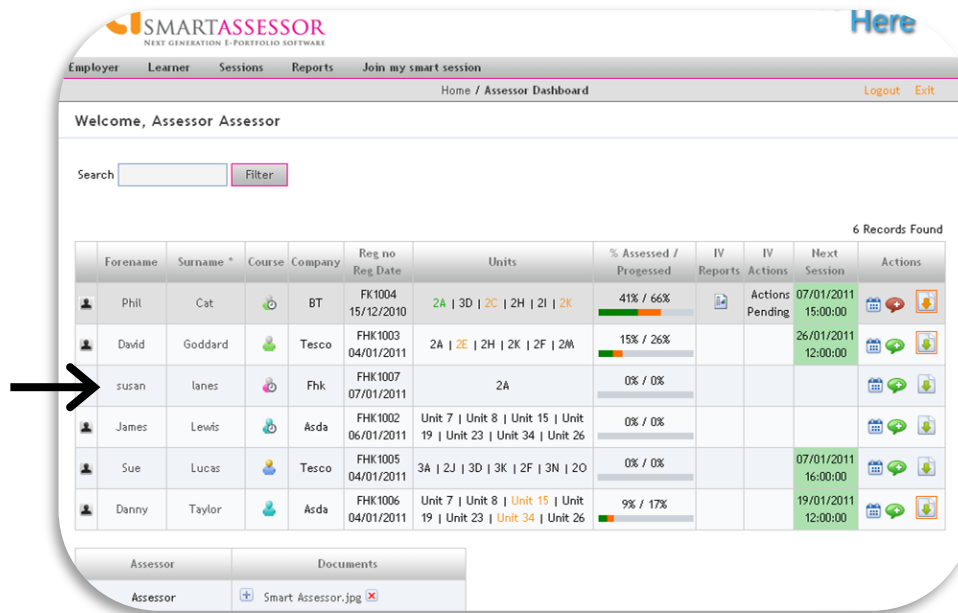
Contact Course Action

Course	Course Start/End	Assessor	IV	Status	Awarding Body	Registration Number	Registration Date	Contract	Edit
Level 2 NVQ Certificate in Activity Leadership (QC	11/11/2011  11/11/2011 	assessor 	lv 	Awaiting induction 	EDEXCEL	FHK1011	11/1/2011 		 

Add

Editing the course information

You can set the estimated date that the Learner will complete using the calendar icon and selecting a date of your choice^①, choose the assessor you want to assign the learner too^②, choose the IV^③, enter the Registration number of the Learner^④ and enter the registration date using the calendar icon^⑤. Once you have entered this information press the save button^⑥ and the Learner will be assigned to the assessor and IV you have chosen and be displayed on your Assessor Dashboard.



SMARTASSESSOR
NEXT GENERATION E-PORTFOLIO SOFTWARE

Employer Learner Sessions Reports Join my smart session

Home / Assessor Dashboard Logout Exit

Welcome, Assessor Assessor

Search Filter

6 Records Found

Forename	Surname *	Course	Company	Reg no	Reg Date	Units	% Assessed / Progressed	IV Reports	IV Actions	Next Session	Actions
Phil	Cat	BT	FK1004	15/12/2010	2A 3D 2C 2H 2I 2K	41% / 66%		Actions Pending	07/01/2011 15:00:00		
David	Goddard	Tesco	FHK1003	04/01/2011	2A 2E 2H 2K 2F 2M	15% / 26%			26/01/2011 12:00:00		
susan	lanes	Fhk	FHK1007	07/01/2011	2A	0% / 0%					
James	Lewis	Asda	FHK1002	06/01/2011	Unit 7 Unit 8 Unit 15 Unit 19 Unit 23 Unit 34 Unit 26	0% / 0%					
Sue	Lucas	Tesco	FHK1005	04/01/2011	3A 2J 3D 3K 2F 3N 2O	0% / 0%			07/01/2011 16:00:00		
Danny	Taylor	Asda	FHK1006	04/01/2011	Unit 7 Unit 8 Unit 15 Unit 19 Unit 23 Unit 34 Unit 26	9% / 17%			19/01/2011 12:00:00		

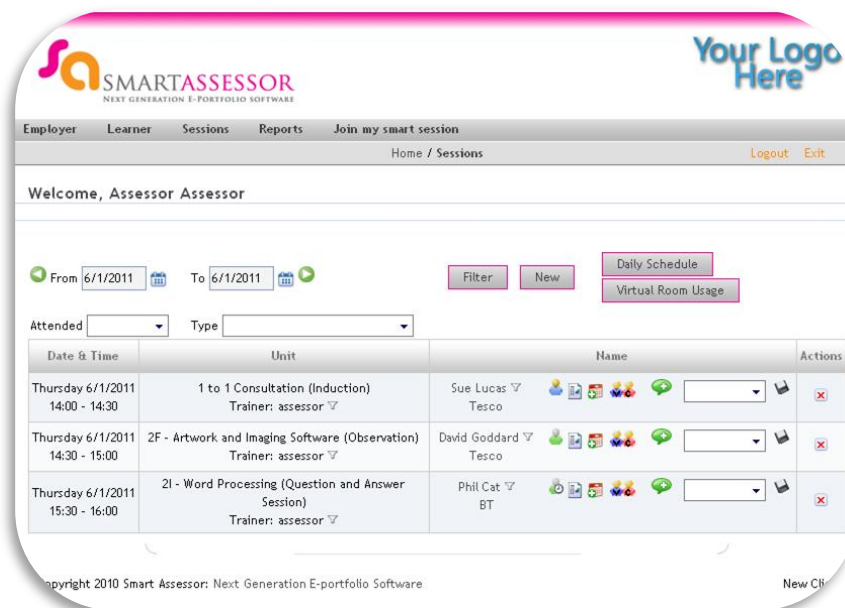
Assessor Documents

Assessor Smart Assessor.jpg

Learner displayed on Assessor Dashboard

The Sessions Tab

This tab allows you to view all sessions booked in by date or between selected dates, filter on all attended or all cancelled, type of session, by learner and by assessor, mark sessions as attended or cancelled and leave comments on sessions, view the Learners portfolio, view the Learners Logs and add session comments.



SMARTASSESSOR
NEXT GENERATION E-PORTFOLIO SOFTWARE

Employer Learner Sessions Reports Join my smart session

Home / Sessions Logout Exit

Welcome, Assessor Assessor

From To

Filter New

Daily Schedule Virtual Room Usage

Attended Type

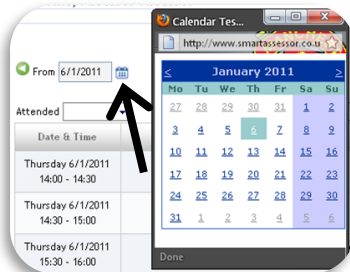
Date & Time	Unit	Name	Actions
Thursday 6/1/2011 14:00 - 14:30	1 to 1 Consultation (Induction) Trainer: assessor	Sue Lucas Tesco	<input type="text"/> <input type="button" value="x"/>
Thursday 6/1/2011 14:30 - 15:00	2F - Artwork and Imaging Software (Observation) Trainer: assessor	David Goddard Tesco	<input type="text"/> <input type="button" value="x"/>
Thursday 6/1/2011 15:30 - 16:00	2I - Word Processing (Question and Answer Session) Trainer: assessor	Phil Cat BT	<input type="text"/> <input type="button" value="x"/>

Copyright 2010 Smart Assessor: Next Generation E-portfolio Software

New Ch

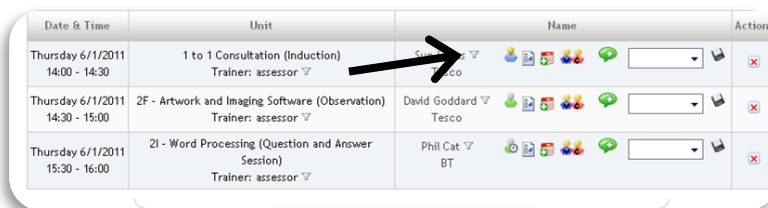
Sessions Screen

To view sessions between certain dates select the dates you by selecting the dates from the calendar or by using the forward/backward 1 day buttons, you will then need to press the filter button the default date will be today's.



Calendar date selection/ Calendar button

To filter by Learner or assessor, click the filter icon by their name in Name column, this will automatically show you all the sessions booked with that Learner/Assessor.

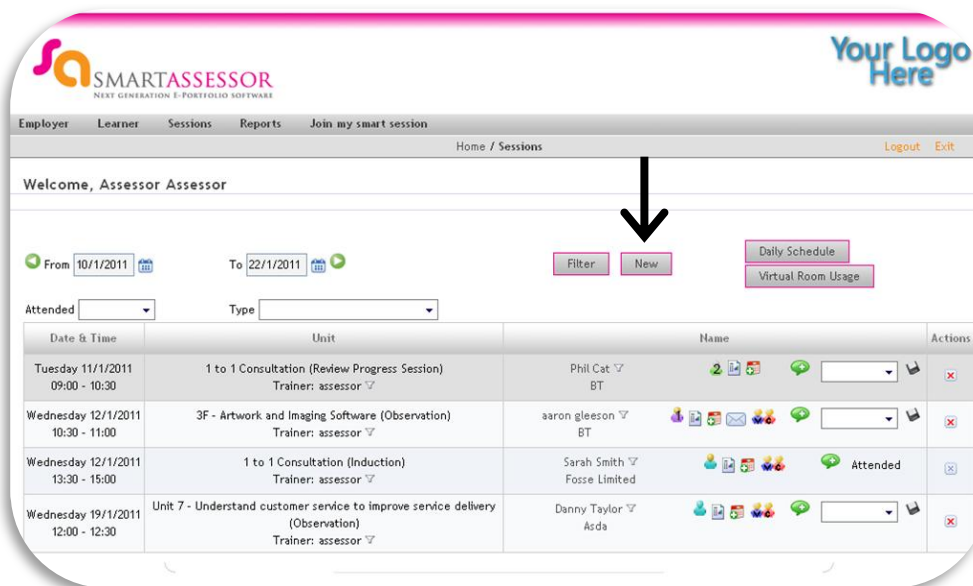


Date & Time	Unit	Name	Actions
Thursday 6/1/2011 14:00 - 14:30	1 to 1 Consultation (Induction) Trainer: assessor	David Goddard Tesco	[Filter icon] [Email icon] [Phone icon] [Chat icon] [Dropdown] [Trash icon]
Thursday 6/1/2011 14:30 - 15:00	2F - Artwork and Imaging Software (Observation) Trainer: assessor	David Goddard Tesco	[Filter icon] [Email icon] [Phone icon] [Chat icon] [Dropdown] [Trash icon]
Thursday 6/1/2011 15:30 - 16:00	2I - Word Processing (Question and Answer Session) Trainer: assessor	Phil Cat BT	[Filter icon] [Email icon] [Phone icon] [Chat icon] [Dropdown] [Trash icon]

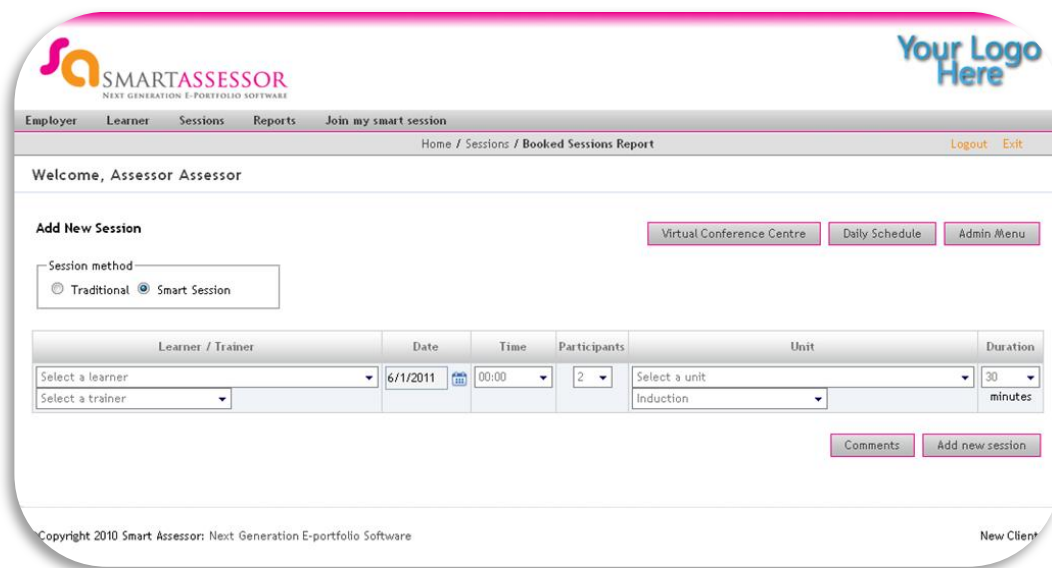
Filter icon

Booking a Session

To book a session you firstly need to click the New button, this will take you to the Add New Session page; from here you can book both a Smart and Traditional Session (A Smart Session is a Session using our integrated virtual training room over the internet, a Traditional Session is a normal face to face meeting).



Add new button



Sessions booking screen

Booking a Smart Session

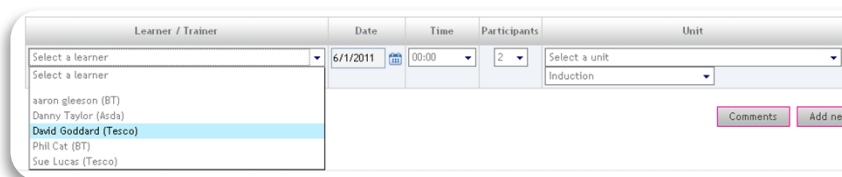
(Please note the notes below are for booking a Smart Session, for a Traditional Session please see page 28)

You firstly need to set the session method as Smart Session, to do this chose which session you want by checking either button next to each one.



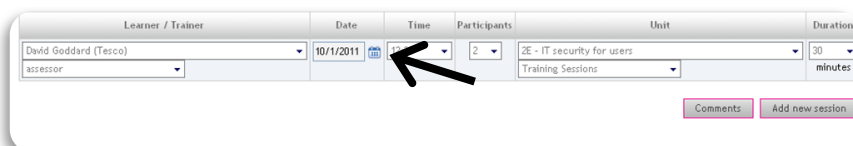
Session Method

Next you need to select the assessor and learner you want the session to be between using the drop down boxes under the heading Learner/Assessor.



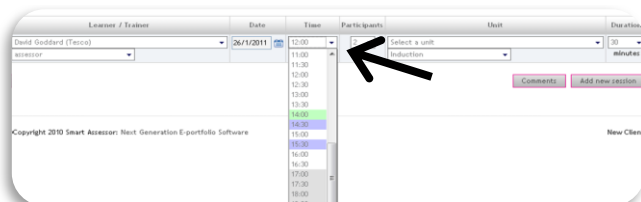
Learner Selection

Then the date of the Session you want to book, you can enter in manually or use the calendar to input the date.



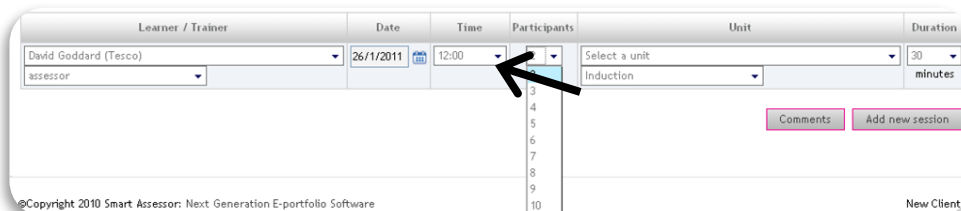
Date selection

You the need to select a time for your meeting, you will notice that times already booked out are highlighted (purple by you and grey for times outside of traditional working hours 9.00am – 5.00pm, you can however still book sessions outside of these times, for more details on how smart sessions booking and licensing works please see Admin User Guide).



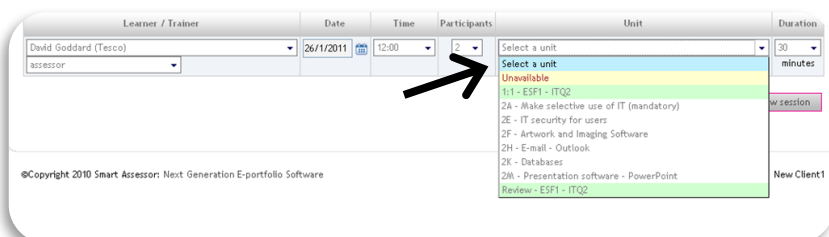
Time Selection

Then you will need to select the number of participants you want, typically a Session will consist of 2 participants, an assessor and a learner, however you may want to do a session with more than one learner, if so change the number of participants accordingly.

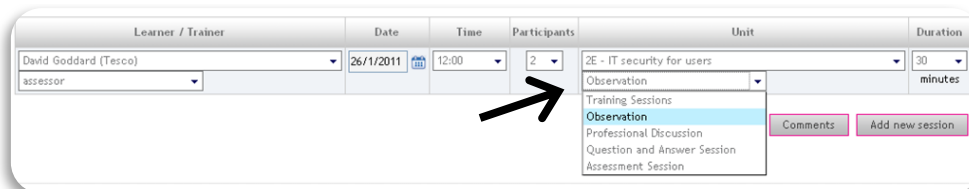


Number of participants

Once you have done this you need to select the unit you want to cover during the session or you can select the whole Qualification or a progress review, you also need to select the type of session you want using the drop down box below the unit box (Training Session, Observation, Professional Discussion, Question and Answer Session or Assessment Session).

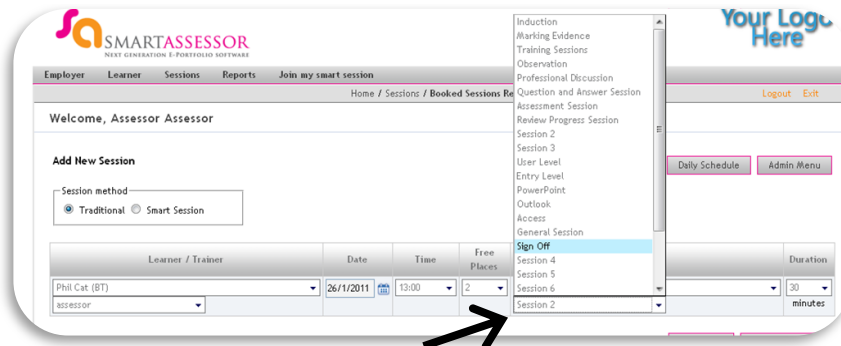


Unit Selection



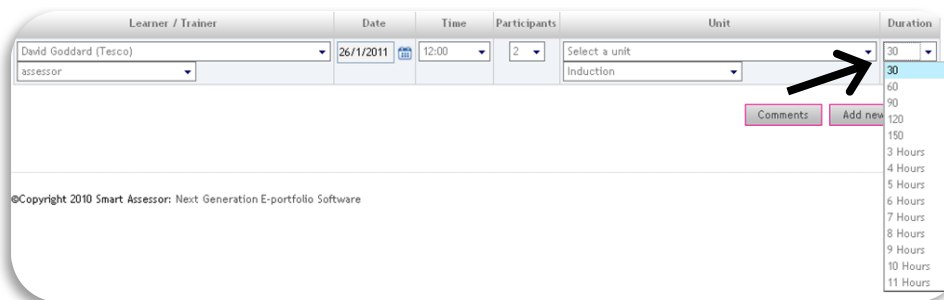
Session Selection

You can also add other types of Session, for example and induction or a sign off session or other sessions that don't apply to a specific unit. To do this do not select a unit, select a session type first and you will be presented with the following options, choose one and then select the unit.



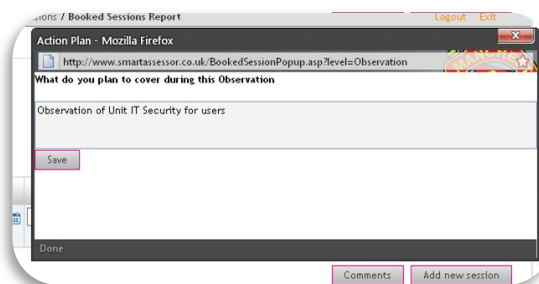
Session Select options 2

Then select the duration of the Session you want to book.



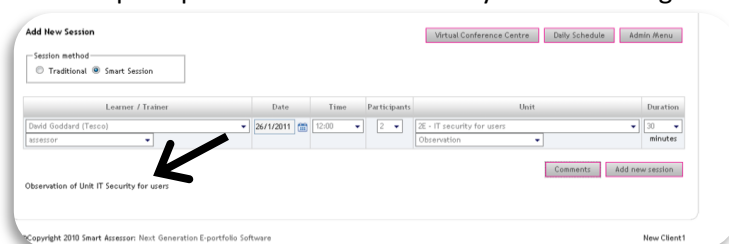
Duration of session

Once you have done this you then press the comments button, which will pop up a box for you to add comments about what you want to cover during the session, press save once you have entered the information.



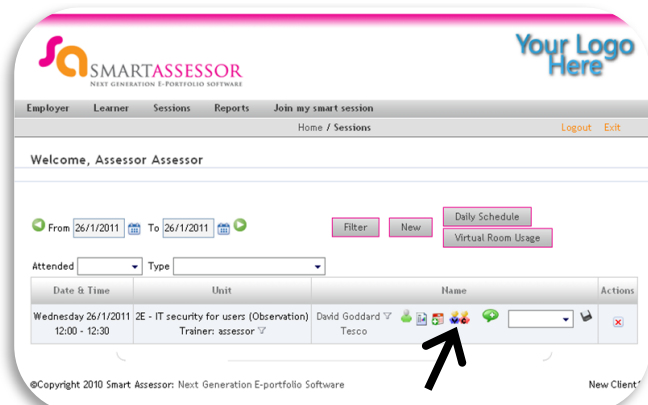
Action plan for session

You will notice it has added the comment to the bottom of the screen, however if you forget this step you will be prompted to enter a comment when you press the Add New Session Button (you will not be prompted to add comments if you are booking an induction).



Comment added at bottom of screen

Once you have done this you press the Add New Session button, this will schedule the session in for the date and time you have chosen, you will be able to view this from your Sessions page by selecting the date you booked it for, you will notice it is a Smart Session by the Smart Session Icon, if you have booked a Traditional Session you will not see this icon.



Session scheduled in for the 26/01/2011 plus Smart Session icon

Booking a Traditional Session

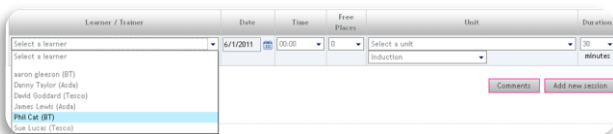
(Please note the notes below are for booking a Traditional Session, for a Smart Session please see page 23)

You firstly need to set the session method as Traditional Session, to do this simply select which you want by checking the button next to each one.



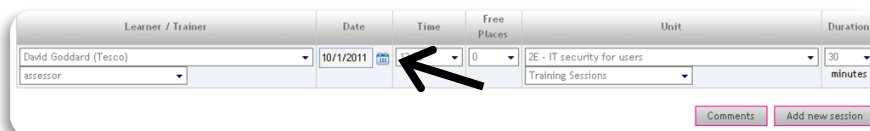
Session Method

Next you need to select the assessor and learner you want the meeting to be between using the drop down boxes.



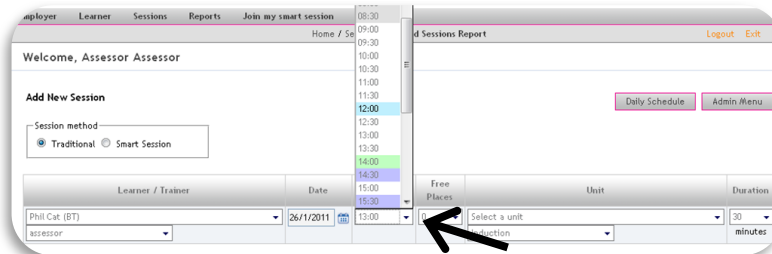
Learner Selection

Then the date of the Session you want to book, you can enter in manually or use the calendar to input the date.



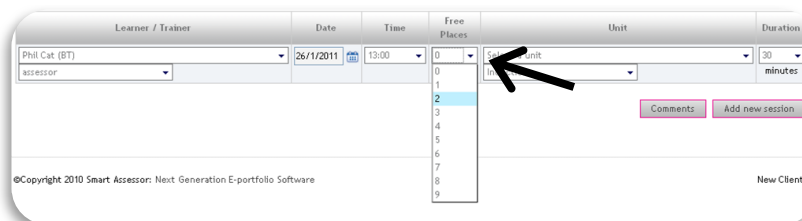
Date Selection

You then need to select a time for your meeting, you will notice that times already allocated to you are highlighted (purple by you and grey for times outside of traditional working hours 9.00am – 5.00pm, you can however still book sessions outside of these times.)



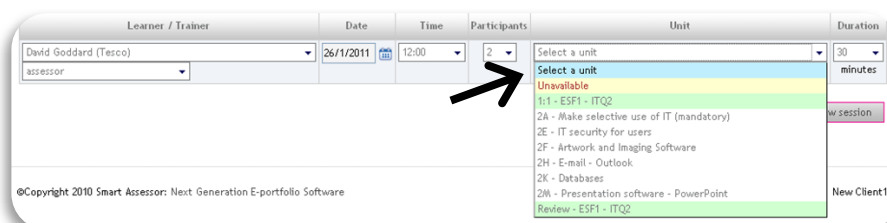
Time Selection

Then you will need to select the number of participants you want, typically a Session will consist of 2 participants, an assessor and a learner, however you may want to do a session with more than one learner, if so change the number of participants accordingly, this is called free places on a traditional Session.

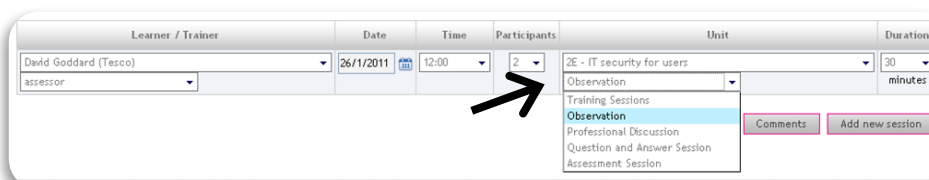


Number of participants

Once you have done this you need to select the unit you want to cover during the session or you can select the whole Qualification or a progress review, you also need to select the type of session you want using the drop down box below the unit box (Training Session, Observation, Professional Discussion, Question and Answer Session or Assessment Session).

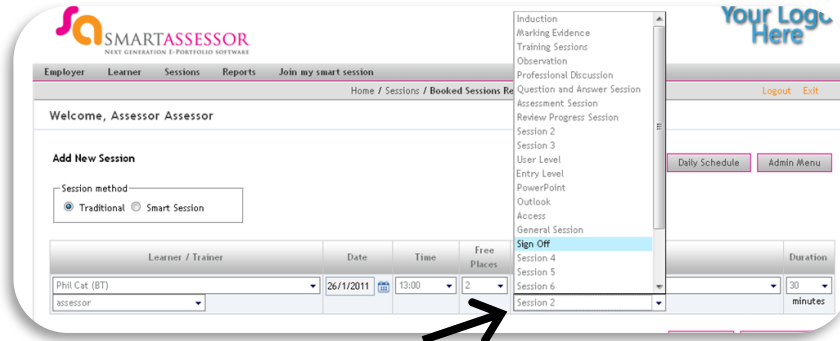


Unit Selection



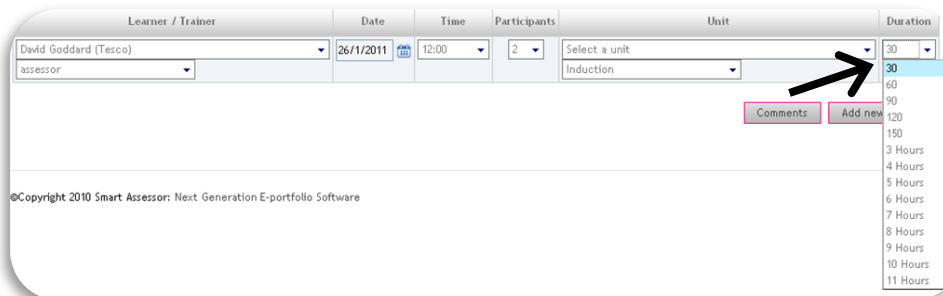
Session Selection

You can also add other types of Session, for example and induction or a sign off session or other sessions that don't apply to a specific unit. To do this do not select a unit, select a session type first and you will be presented with the following options, choose one and then select the unit.



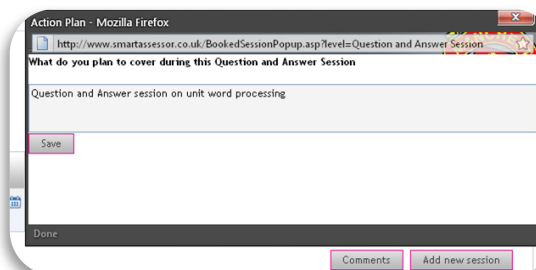
Session Select options 2

Then select the duration of the Session you want to book.



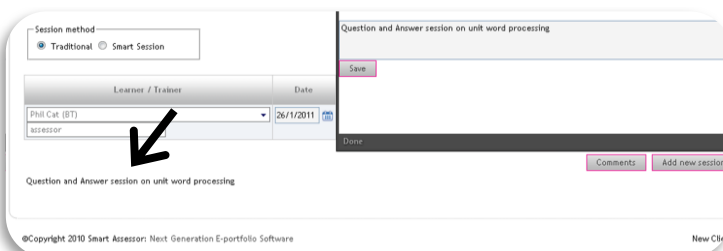
Duration of session

Once you have done this you then press the comments button, with will pop up a box for you to add comments about what you want to cover during the session, press save once you have entered the information.



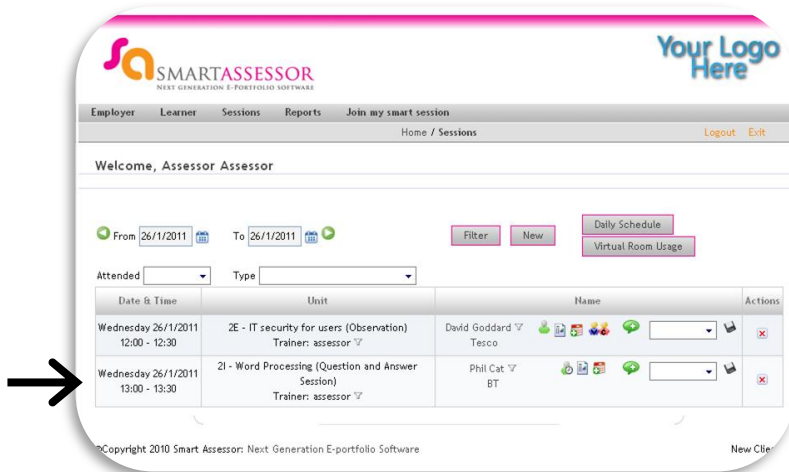
Action plan for session

You will notice it has added the comment to the bottom of the screen, however if you forget this step you will be prompted to enter a comment when you press the Add New Session Button



Comment added at bottom of screen

Once you have done this you press the Add New Session button, this will schedule the session for the date and time you have chosen, which you will be able to view from you Sessions page by selecting the date you booked it for.



Session scheduled in for the 26/01/2011

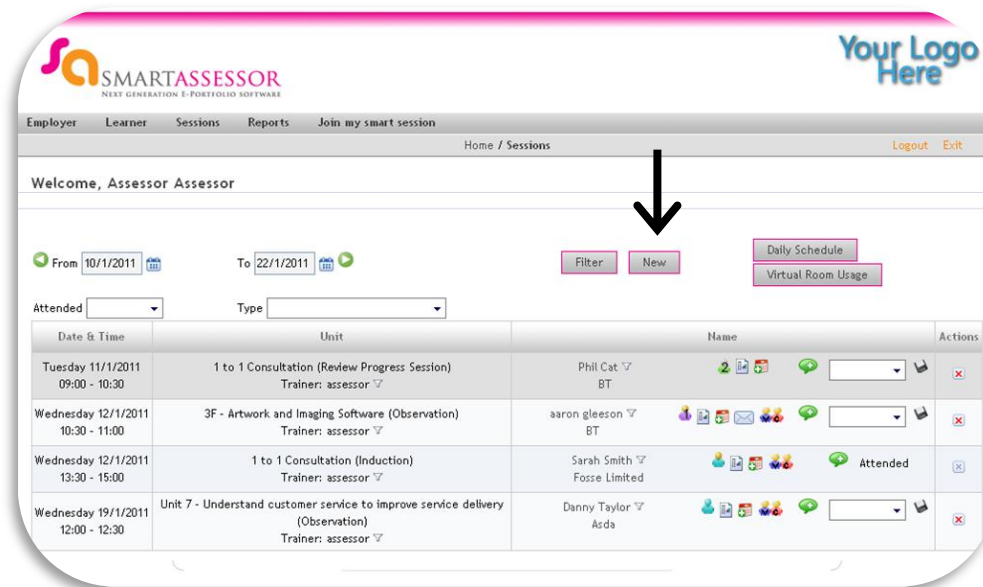
You will notice the difference between a Traditional session and a Smart Session is the Traditional Session doesn't have the Smart Session icon, by clicking this icon it will launch you straight into any current session that is booked.

Date & Time	Unit	Name	Actions
Wednesday 26/1/2011 12:00 - 12:30	2E - IT security for users (Observation) Trainer: assessor ▼	David Goddard ▼ Tesco	[Icons: calendar, document, speech bubble, etc.] [Dropdown menu] [Delete icon]
Wednesday 26/1/2011 13:00 - 13:30	2I - Word Processing (Question and Answer Session) Trainer: assessor ▼	Phil Cat ▼ BT	[Icons: calendar, document, speech bubble, etc.] [Dropdown menu] [Delete icon]

Smart Session icon

Booking an assessor as unavailable

To book an Assessor and unavailable you firstly need to click the New button; this will take you to the Add New Session page. Both you and the Assessor can book Unavailable slots.



SMARTASSESSOR
NEXT GENERATION E-PORTFOLIO SOFTWARE

Your Logo Here

Employer Learner Sessions Reports Join my smart session Home / Sessions Logout Exit

Welcome, Assessor Assessor

From 10/1/2011 To 22/1/2011 Filter New Daily Schedule Virtual Room Usage

Attended Type

Date & Time	Unit	Name	Actions
Tuesday 11/1/2011 09:00 - 10:30	1 to 1 Consultation (Review Progress Session) Trainer: assessor	Phil Cat BT	
Wednesday 12/1/2011 10:30 - 11:00	3F - Artwork and Imaging Software (Observation) Trainer: assessor	aaron gleeson BT	
Wednesday 12/1/2011 13:30 - 15:00	1 to 1 Consultation (Induction) Trainer: assessor	Sarah Smith Fosse Limited	Attended
Wednesday 19/1/2011 12:00 - 12:30	Unit 7 - Understand customer service to improve service delivery (Observation) Trainer: assessor	Danny Taylor Asda	

Add new button

You firstly need to set the session method as Traditional Session, to do this simply select which you want by checking the button next to each one.

Session method

☒ Traditional ☐ Smart Session

Session Method

Next you need to select the assessor using the drop down box.

Learner / Assessor

Select a learner Select a Assessor

18/1/2011 00:00 2 Select a unit Induction

Comments Add new session

assessor assessor2 Phil

Learner Selection

Then the date of the Session you want to book, you can enter in manually or use the calendar to input the date.

Learner / Trainer

David Goddard (Tesco) assessor

10/1/2011

Time

Free Places 0

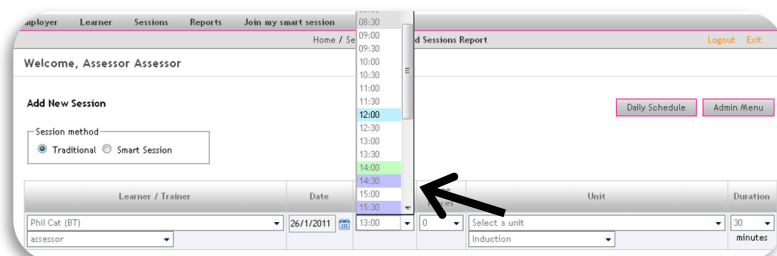
Unit 2E - IT security for users Training Sessions

Duration 30 minutes

Comments Add new session

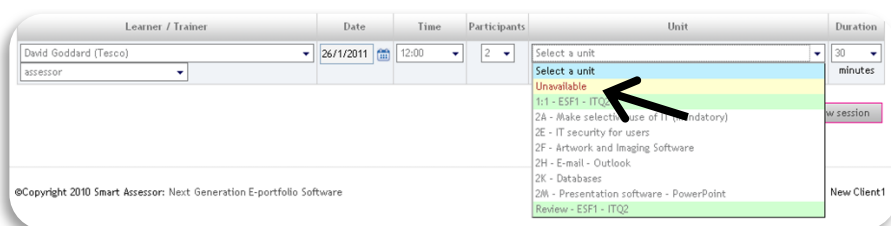
Date Selection

You then need to select a time for your meeting, you will notice that times already allocated are a different colour.



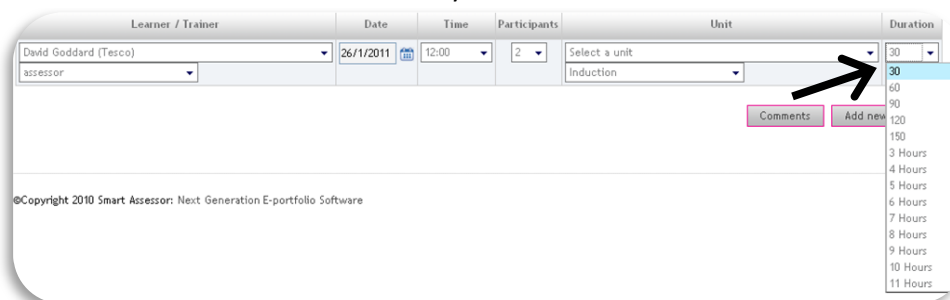
Time Selection

Once you have done this you need to select unavailable from the drop down box.



Unavailable Selection

Then select the duration of the Session you want to book.



Duration of session

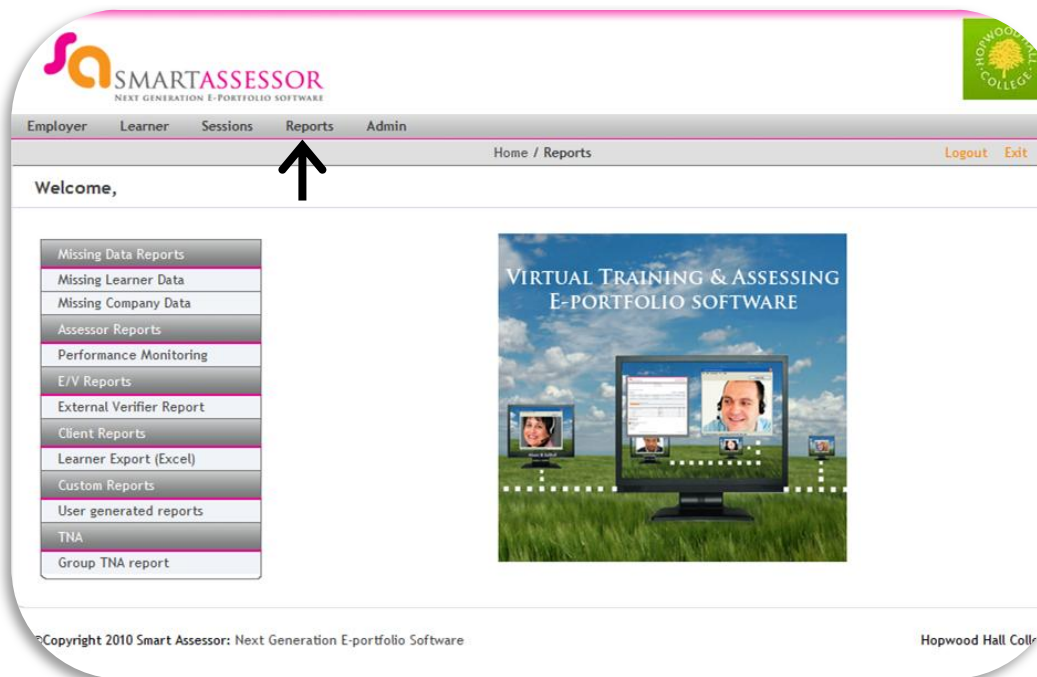
Once this has been done press the Add new session button to allocate that assessor as unavailable.

Conference licences (Smart Assessor Licensing)

The way the Licences work for the Smart Assessor client (Nefsis) is that every person in the meeting needs to have 1 licence; so for a meeting between an assessor and learner 2 licences are needed, a meeting between an assessor and 2 learners requires 3 licences etc. We sell them to you on a room basis, 1 room contains 2 licences allowing 1 assessor and 1 learner to use the Smart Session Client, if you have 2 rooms 2 assessors can use the rooms with 1 learner each or 1 assessor can have up to 3 learners etc. If you wish to buy more licences from us please contact us (see page **Error! Bookmark not defined.**) and we will set them up for you.

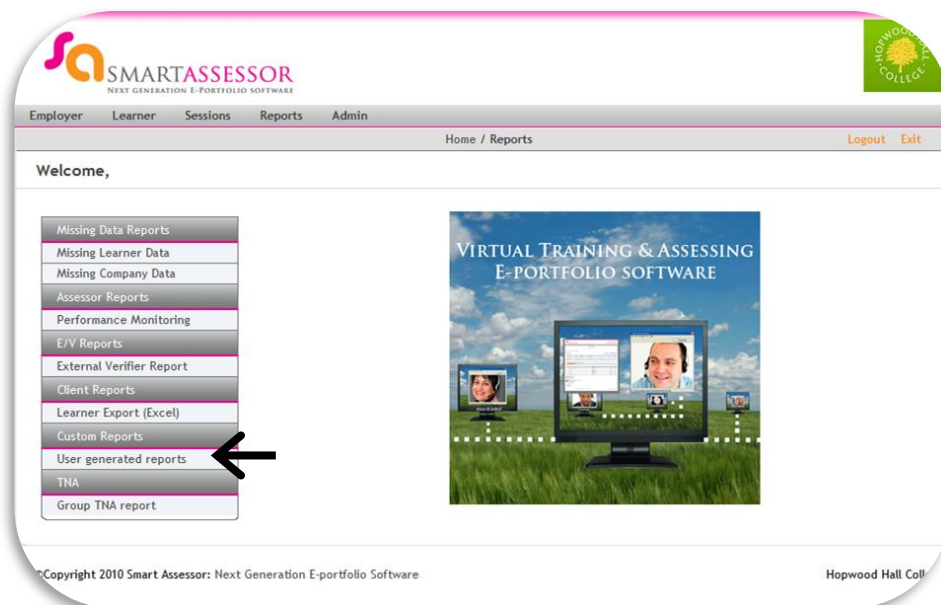
Reports

You can view many different reports in smart assessor from the reports tab.



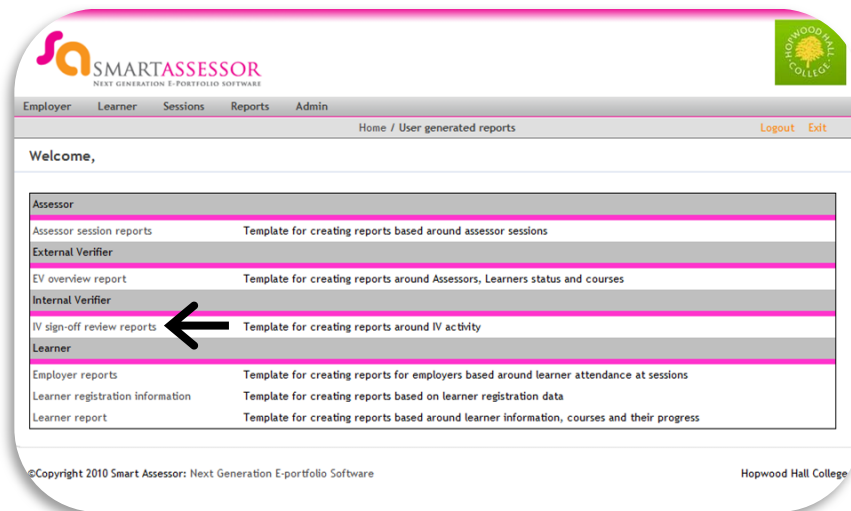
Reports tab

Reports can be accessed from this page, such as, Missing Learner data, Missing Company data, Performance monitoring, EV Reports, Learner Export, Group TNA and you can create your own reports based on set criteria by you and save these reports for later use. To create a custom report click the User Generated reports button.



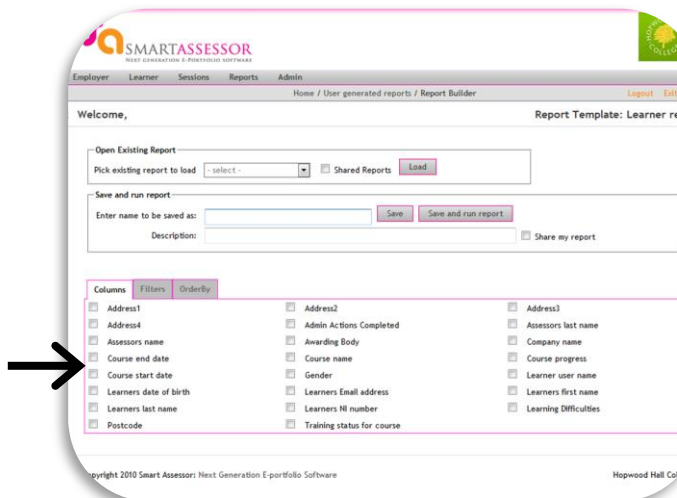
Custom Reports

This will open the custom report creator; you must first select the template you want to use for the report you're going to create E.G. Learner report or Employer report.



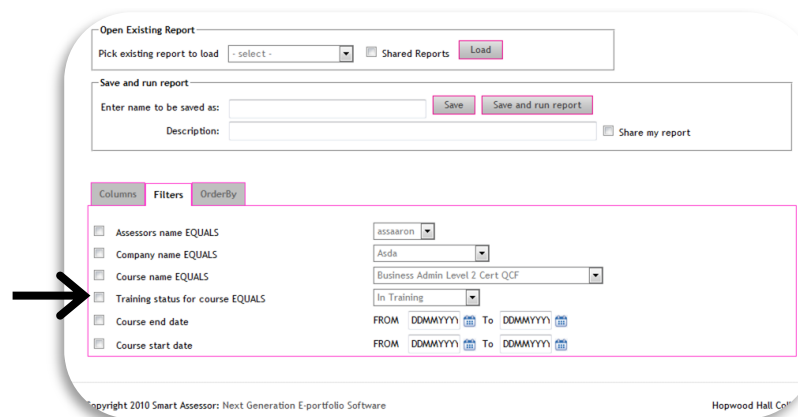
Custom Reports template selector

This will open the report template for the report you want to create, you must then select the field you want to be in your report by ticking the boxes.



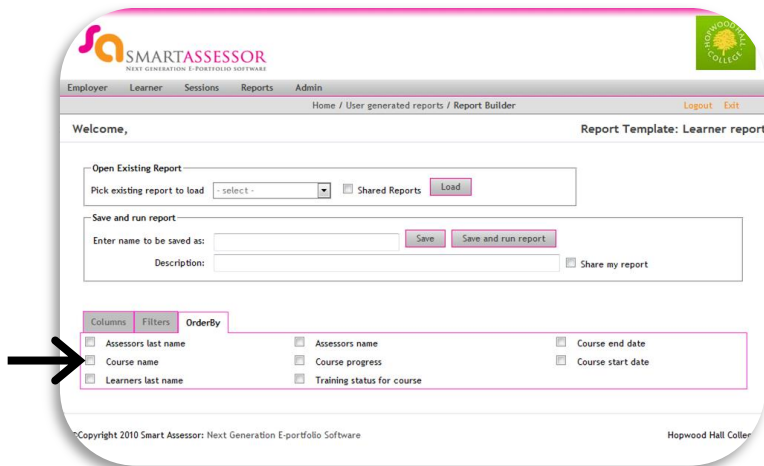
Custom Reports Columns selection

Then click the filter tab, and select the fields you want to filter your report on. By ticking the box next to each one and selecting the criteria, these can be left blank should you wish them too.



Custom Reports filter selection

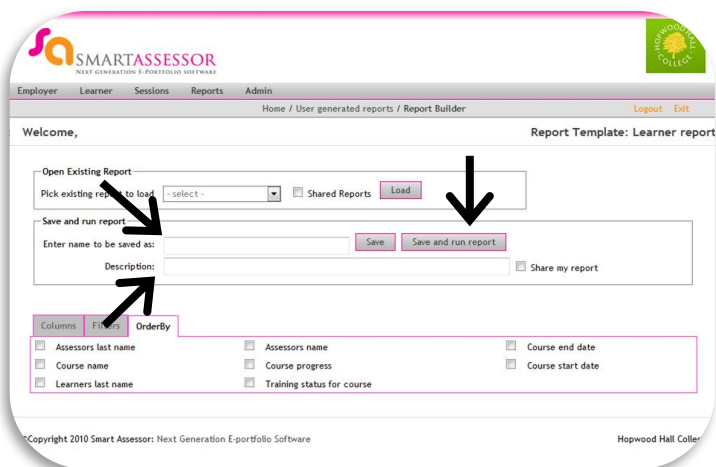
And then click the order by tab, and select the fields you want to order your report by, this can also be left blank should you wish.



The screenshot shows the 'Report Builder' interface with the 'OrderBy' tab selected. The 'Columns' and 'Filters' tabs are also visible. The 'OrderBy' section contains a list of fields with checkboxes: Assessors last name, Course name, Learners last name, Assessors name, Course progress, Training status for course, Course end date, and Course start date. A black arrow points to the 'OrderBy' tab.

Custom Reports Order by selection

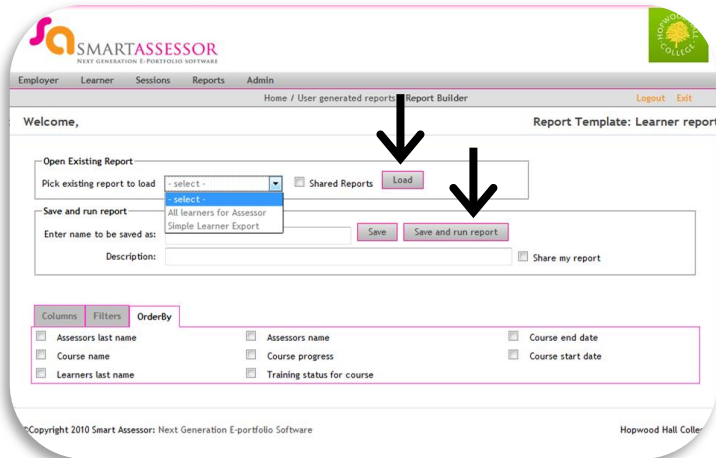
Once you have selected all the criteria of the report, you then need to name it, and give it a description, then press the Save and Run Report button to run your report. This also automatically saves the report for later use. Please note that when you run a report your web browser may try to block it as a pop up, if this is the case then add Smartassessor.co.uk to your safe list or simply press allow if a pop up comes up warning you about it (refer to your browsers help screens for more info on this).



The screenshot shows the 'Report Builder' interface with the 'Save and run report' section highlighted. Two black arrows point to the 'Save and run report' button and the 'Enter name to be saved as' field. The 'OrderBy' tab is also visible.

Custom Reports Naming

To run existing reports select the report you want to run from the drop down box then press the load button and then press the save and run button.

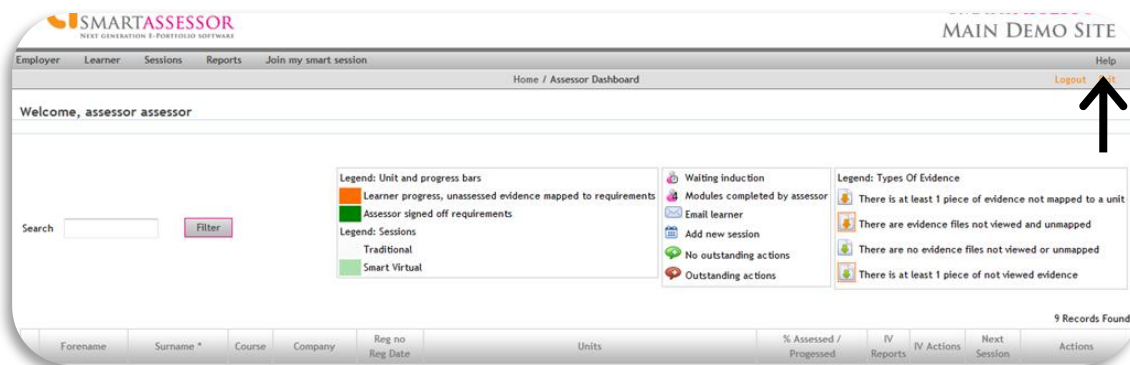


The screenshot shows the 'Report Builder' interface. At the top, there's a navigation bar with 'Employer', 'Learner', 'Sessions', 'Reports', and 'Admin'. Below this, a 'Welcome,' message is on the left and 'Report Template: Learner report' is on the right. The main section is titled 'Open Existing Report' and contains a 'Pick existing report to load' dropdown menu with a 'select' option highlighted. To the right of the dropdown is a 'Load' button. Below the dropdown is a 'Save and run report' section with a 'Save' button and a 'Save and run report' button. A 'Description:' field is also present. At the bottom, there's a 'Columns' section with checkboxes for 'Assessors last name', 'Course name', 'Learners last name', 'Assessors name', 'Course progress', 'Training status for course', 'Course end date', and 'Course start date'. The footer includes 'Copyright 2010 Smart Assessor: Next Generation E-portfolio Software' and 'Hopwood Hall College'.

Custom Reports Loading existing report

Additional Help and Support

Should you require any additional help and support please visit the help section on our website, you can access this by clicking the help button when you log in to your system.



Alternatively you can contact us by:

T: 0845 460 4440

E: info@smartassessor.com

W: smartassessor.com

To download other User guides visit our website.

User guides available for:

- Learner
- Internal Verifier
- External Verifier
- Assessor
- Admin

For the Smart Session Client (Nefsis) Support please visit:

<http://www.nefsis.com/manual/user-manual.html>